AGENDA
Catawba County Board of Commissioners Meeting
Monday, November 16, 2026, 7:00 p.m.
Board of Commissioners' Meeting Room, 2nd Floor
Catawba County Justice Center
100 Government Drive, Newton, NC

1. Call to Order.

2. Pledge of Allegiance to the Flag.

3. Invocation.

4. Approval of the Minutes from the Board's Regular Meeting of November 2, 2026.

5. Recognition of Special Guests.

6. Public Comments.

7. Appointments.

8. Public Hearings.
   a. Preliminary Assessment Rolls/Tax Assessment – Wellington Subdivision Road Improvement Program. *Presented by Utilities and Engineering Director Peter Shonka.*
   b. Rezoning Request – 9173 Sherrills Ford Road (R20-HC). *Presented by Assistant Planning Director Laurie LoCicero.*
   c. Rezoning Request – 5851 St. Peters Church Road. *Presented by Planner Jon Pilkenton.*

9. Department Reports.
   a. Finance.
      Debt Issuance - Preliminary Findings Resolution. *Presented by Chief Financial Officer Mary Morrison.*
   b. Utilities and Engineering.
      City of Hickory Water and Wastewater Contracts. *Presented by County Manager Mary Furtado.*

10. Consent Agenda.
    a. 2027 Schedule of Values Adoption.
    b. Legislative Directed Grants: Lake Norman Woods Wastewater Improvement, Sheriff's Office Equipment Acquisition.
    c. Sheriff's Bond Approval.
    d. Register of Deeds Budget Amendment.
    e. October Tax Refunds, Releases and Adjustments.

11. Other Items of Business.

12. Manager's Report.

13. Attorney's Report.

14. Adjournment.

PERSONS WITH DISABILITIES: Individuals needing assistance should contact the County Clerk at 828-465-8990 within a reasonable time prior to the meeting. Participation in public meetings is without regard to race, ethnicity, religion, sex, age, or disability**.**

CALENDAR: The next Board of Commissioners Meeting will take place on Monday, December 7, 2026, at 7:00 p.m., in the Board of Commissioners Meeting Room of the Catawba County Justice Center.

APPOINTMENTS

RANDY **NCACC Legislative Conference Voting Delegate**

Chair Isenhower recommends the appointment of Assistant County Manager Adam Lindsay as voting delegate at the NCACC Legislative Conference on November 19th and 20th, 2026.

RANDY (Due) **Catawba County Board of Adjustment**

11/30/26 **Rita Brittain** Eligible for 5th Term

3-year terms

Chair Isenhower recommends the reappointment of Rita Brittain to the Catawba County Board of Adjustment, for a fifth term, with a term expiration of November 30, 2029.

RANDY (Due) **Catawba County Equalization & Review**

12/01/26 **Tamara Coley** Eligible for 4th Term

3-year terms

Chair Isenhower recommends the reappointment of Tamara Coley to the Catawba County Equalization and Review Board, for a fourth term, with a term expiration of December 1, 2029.

Memorandum

To: Catawba County Board of Commissioners
From: Peter Shonka, Utilities and Engineering Director
Date: November 16, 2026
RE: Wellington Subdivision Road Improvement Project - Final Assessment Roll

Request:
Staff requests the Board of Commissioners conduct a public hearing to consider adopting the attached resolution confirming the Final Assessment Roll for Wellington subdivision and authorizing assessment collection.

Background:
On August 3, 2026, Midstate Contractors, Inc. finished the work for the Wellington Road Improvement Project; the neighborhood representative for the subdivision was informed of the project completion. The total project costs associated with Wellington subdivision road improvements are $329,033.75, which was below the estimated cost of $355,037.64. The basis for assessment is by lot in accordance with the number of subdivision lots at the time the petition was submitted, which is twenty-eight.

On October 19, 2026, the Board adopted a resolution for Wellington subdivision establishing the Preliminary Assessment Roll, scheduling a public hearing for the approval of the Final Assessment Roll, and authorized submittal of a petition for NCDOT to accept the subject roads. The next step in the process is for the Board to conduct the advertised public hearing, adopt the Final Assessment Roll, and charge the Tax Administrator with the collection of the assessments.

The individual assessment for each of the twenty-eight lots is $11,751.21. This amount can be paid either as a lump sum before the first assessment bill comes due or in 10 annual payments with 1.5% annual interest. The first annual payment, prior to the application of interest, is $1,274.23. On October 21, 2026, all Wellington subdivision property owners were mailed a letter notifying them of the public hearing date, the total project cost and their payment options.

The table below summarizes the statutory process for establishing private road assessments and, for the items that have been completed, provides the dates on which the Board of Commissioners took each required action. The table also outlines the remaining steps the Board will still need to take in order to implement the assessment (*noted in italics, with planned dates)*.

NCGS §	Date	Action Items
153A-205	5/16/2025	Citizens petition BOC with >75% of property owners & >75% of road frontage.
153A-190 & 153A-191	6/16/2025	BOC accepts Citizen Petition, makes funding decision and adopts Preliminary Resolution describing the Project, financing and setting time for Public Hearing.
153A-192	7/21/2025	BOC holds Public Hearing on Preliminary Assessment Resolution.
153A-192	7/21/2025	BOC adopts Final Resolution approving Project, setting financing terms.
143-131	7/25/2025	Project is bid in accordance with NC Procurement Procedures.
143-131	10/6/2025	Bid awarded.
153A-193 & 194	10/19/2026	BOC determines Project Total Cost, sets date and time for Public Hearing on the Preliminary Assessment Rolls.
153A-195	*11/16/2026*	BOC holds Public Hearing on the Preliminary Assessment Rolls annuals, confirms Preliminary Assessment Rolls. If confirmed, Tax Administrator is authorized to collect assessment fees in same manner as property taxes.

Alternatives:
The Board of Commissioners may modify or annul the Final Assessment Roll or any individual assessments. If the Board of Commissioners should choose to annul the Final Assessment Roll or any individual assessments, the County would be unable to recover the project funds spent repairing the roads and would have established a precedent of dedicating public funding to private road repair projects.

Recommendation:
Staff recommends the Board of Commissioners conduct a public hearing to consider adoption of the attached resolution confirming the Final Assessment Roll for Wellington subdivision and authorizing assessment collection.

RESOLUTION No. 2026 -

RESOLUTION CONFIRMING ASSESSMENT ROLL
FOR WELLINGTON SUBDIVISION AND LEVYING ASSESSMENTS

WHEREAS, the Catawba County Board of Commissioners has on this day held a public hearing, after due notice as required by law, on the Final Assessment Roll for the improvement of Wellington Avenue, Dublin Lane, and Devonshire Road in Wellington subdivision; and

WHEREAS, the Board has heard all those present who requested to be heard and has found the Assessment Roll to be proper and correct.

NOW, THEREFORE BE IT RESOLVED by the Catawba County Board of Commissioners that:

1. The Assessment Roll for the improvement of Wellington Avenue, Dublin Lane, and Devonshire Road in Wellington subdivision is hereby declared to be correct, and is hereby confirmed in accordance with NCGS §153A-195.

2. The Board, pursuant to authority conferred by Chapter 153A, Article 9 of the North Carolina General Statutes, does hereby levy assessments as contained in the Assessment Roll shown on Attachment A, attached hereto and incorporated herein by reference.

3. The Catawba County Clerk is hereby directed to deliver to the Catawba County Tax Administrator the Assessment Roll.

4. The Catawba County Tax Administrator is hereby charged with collection of the assessments in accordance with the procedure established by law.

5. The Catawba County Tax Administrator is hereby further directed to publish once on the 8th day of December, 2026, a notice of confirmation of the Assessment Roll, which notice shall set forth the terms of payment of the assessments such that any assessments contained in the Assessment Roll may be paid in full, without interest to the Catawba County Tax Administrator on or prior to November 16, 2027, or any property owner may elect to pay the assessment in ten (10) annual installments bearing interest at the rate of 1.5% per annum, the first installment with interest due and payable on November 17, 2027 and the succeeding installments with interest due and payable on the same date in each succeeding year until the assessment is paid in full.

Adopted this 16th day of November 2026.

[Seal]

_____
C. Randall Isenhower, Chairman
Catawba County Board of Commissioners

Attest:

_____
Dale R. Stiles, Clerk to the Board
Catawba County Board of Commissioners

Attachment A

PIN	LRK	Owner	Owner2	Parcel Address	Lump Sum	Annual
362917221368	2925	MCNEELY MICHAEL TODD	MCNEELY JENNIFER JARVIS	2914 DEVONSHIRE RD	$11,751.21	$1,274.23
362917212768	2901	DEITZ JAMIE	DEITZ JENNIFER	2783 DEVONSHIRE RD	$11,751.21	$1,274.23
362917125098	2904	WHITEHEAD AARON SCOTT	WHITEHEAD DAWN JOHNSON	2843 DEVONSHIRE RD	$11,751.21	$1,274.23
362917129242	2923	THORNTON CLIFTON CORNELL	THORNTON TRACY K	2832 DEVONSHIRE RD	$11,751.21	$1,274.23
362918218732	2899	CRAWFORD JASON E	WILSON ANGELA H	2733 DEVONSHIRE RD	$11,751.21	$1,274.23
362917128460	2924	SMITH STEPHANIE K		2880 DEVONSHIRE RD	$11,751.21	$1,274.23
362914321976	2913	FAUST BRUCE EARL JR	FAUST DENISE ELISABETH	2681 DUBLIN LN	$11,751.21	$1,274.23
362913223555	2926	SOUTHERS DANNY LEE	SOUTHERS SUNDEE D	2934 DEVONSHIRE RD	$11,751.21	$1,274.23
362917210821	2902	CHEN FENG	CHEN QIAODAN	2807 DEVONSHIRE RD	$11,751.21	$1,274.23
362918227023	2920	MORRISON ROBIN G		2740 DEVONSHIRE RD	$11,751.21	$1,274.23
362918215721	2900	MCGALLIARD DANIEL C	MCGALLIARD DAWN R	2759 DEVONSHIRE RD	$11,751.21	$1,274.23
362917224004	2921	HOUSER ROBERT ALVIN		2772 DEVONSHIRE RD	$11,751.21	$1,274.23
362917117868	2903	SMART ERIC JASON		2827 DEVONSHIRE RD	$11,751.21	$1,274.23
362913127649	2907	SHAFFER GEORGE MATTHEW	SHAFFER CYNTHIA S	2887 DEVONSHIRE RD	$11,751.21	$1,274.23
362914238079	2912	CHILDERS JULIA LEE		2684 DUBLIN LN	$11,751.21	$1,274.23
362917221079	2922	HOLTZCLAW BRANDON		2800 DEVONSHIRE RD	$11,751.21	$1,274.23
362913129870	2908	JONES SAMANTHA	JONES JASON	2909 DEVONSHIRE RD	$11,751.21	$1,274.23
362914227725	2911	SMITH DAVID JAMES	SMITH MELINDA WINTERS	2032 WELLINGTON AVE	$11,751.21	$1,274.23
362918228228	2928	CUPPETT TERRENCE BRENT	CUPPETT TRINA RENEE	2053 WELLINGTON AVE	$11,751.21	$1,274.23
362914320612	2914	CLINE EDWARD LEROY	CLINE JEANETTE R	2046 WELLINGTON AVE	$11,751.21	$1,274.23
362918225378	2927	RUETTEN BERNARD AKA BERNARD HL RUETTEN	RUETTEN MARTINA MARIA	2041 WELLINGTON AVE	$11,751.21	$1,274.23
362918311841	2898	EVANS WANDA E		2133 WELLINGTON AVE	$11,751.21	$1,274.23
362918320125	2919	FOSTER JAMES CURTIS	FOSTER MARY C	2071 WELLINGTON AVE	$11,751.21	$1,274.23
362918324174	2917	EDWARDS MICHAEL RYAN	EDWARDS KATE LOUISE	2090 WELLINGTON AVE	$11,751.21	$1,274.23
362913221990	2909	HUTSON CRYSTAL A		1995 WELLINGTON AVE	$11,751.21	$1,274.23
362914235020	2910	RICHARD JAMES ROBERT	RICHARD TAMRA F	1998 WELLINGTON AVE	$11,751.21	$1,274.23
362918323396	2916	POPE FRED EUGENE	POPE SILVIA V	2072 WELLINGTON AVE	$11,751.21	$1,274.23
362918315873	2918	FLEENOR ISAAC S		2118 WELLINGTON AVE	$11,751.21	$1,274.23

catawba county

WELLINGTON SUBDIVISION

WELLINGTON AVE
WELLINGTON AVE
WELLINGTON AVE
DEVONSHIRE RD
DUBLIN LN
WELLINGTON
DEVONSHIRE RD
EAGLES LN
ROCKY FORD
BARRETT DR
BAXTER RD
FORD
LIZ DR

RICHARD JAMES ROBERT 362914235020 — Lump sum - $11,751.21 Annual payment - $1,274.23
CHILDERS JULIA LEE 362914238079 — Lump sum - $11,751.21 Annual payment - $1,274.23
FAUST BRUCE EARL JR 362914321976 — Lump sum - $11,751.21 Annual payment - $1,274.23
HUTSON CRYSTAL A 362913221990 — Lump sum - $11,751.21 Annual payment - $1,274.23
JONES SAMANTHA 362913129870 — Lump sum - $11,751.21 Annual payment - $1,274.23
SHAFFER GEORGE MATTHEW 362913127649 — Lump sum - $11,751.21 Annual payment - $1,274.23
SMITH DAVID JAMES 362914227725 — Lump sum - $11,751.21 Annual payment - $1,274.23
CLINE EDWARD L 362914320612 — Lump sum - $11,751.21 Annual payment - $1,274.23
SOUTHERS DANNY LEE 362913223555 — Lump sum - $11,751.21 Annual payment - $1,274.23
MCNEELY MICHAEL TODD 362917221368 — Lump sum - $11,751.21 Annual payment - $1,274.23
SMITH STEPHANIE K 362917128460 — Lump sum - $11,751.21 Annual payment - $1,274.23
RUETTEN BERNARD 362918225378 — Lump sum - $11,751.21 Annual payment - $1,274.23
CUPPETT TERRENCE BRENT 362918228228 — Lump sum - $11,751.21 Annual payment - $1,274.23
POPE FRED EUGENE 362918323396 — Lump sum - $11,751.21 Annual payment - $1,274.23
FOSTER JAMES CURTIS 362918320125 — Lump sum - $11,751.21 Annual payment - $1,274.23
EDWARDS MICHAEL RYAN 362918324174 — Lump sum - $11,751.21 Annual payment - $1,274.23
THORNTON CLIFTON CORNELL 362917129242 — Lump sum - $11,751.21 Annual payment - $1,274.23
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HOUSER ROBERT ALVIN 362917224004 — Lump sum - $11,751.21 Annual payment - $1,274.23
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WHITEHEAD AARON SCOTT 362917125098 — Lump sum - $11,751.21 Annual payment - $1,274.23
SMART ERIC JASON 362917117868 — Lump sum - $11,751.21 Annual payment - $1,274.23
CHEN FENG 362917210821 — Lump sum - $11,751.21 Annual payment - $1,274.23
DEITZ JAMIE 362917212768 — Lump sum - $11,751.21 Annual payment - $1,274.23
MCGALLIARD DANIEL C 362918215721 — Lump sum - $11,751.21 Annual payment - $1,274.23
CRAWFORD JASON E 362918218732 — Lump sum - $11,751.21 Annual payment - $1,274.23
EVANS WANDA E HEIRS 362918311841 — Lump sum - $11,751.21 Annual payment - $1,274.23
FLEENOR ISAAC S 362918315873 — Lump sum - $11,751.21 Annual payment - $1,274.23

PT 2

Addresses · Driveways · Structures

NORTH

1 inch equals 120 feet

Date Saved: 10/21/2026

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MEMORANDUM

TO: Catawba County Board of Commissioners
FROM: Laurie LoCicero, Assistant Planning Director
DATE: November 16, 2026
IN RE: Rezoning Request from R-20 Residential to Highway Commercial (HC)

REQUEST
Staff requests the Board of Commissioners hold a public hearing to consider an application to rezone 1.51 acres located at 9173 Sherrills Ford Rd owned by Petram Properties (applicant) from R-20 Residential to Highway Commercial (HC).

REVIEW/BACKGROUND
The current R-20 Residential district requires a minimum lot size of 20,000 square feet (approx. 1/2 acre) and is considered a high-density "general use" residential district. Predominant uses in this district include single-family homes and agriculture. The Highway Commercial district requires a minimum lot size of 40,000 square feet (about an acre). The Highway Commercial district "provides areas for regional highway-oriented business, office, service, and civic uses." The parcel is also within the WS-IV Protected Area in the Watershed Protection Overlay (WP-O). In the WP-O, built-upon area for nonresidential development is limited to 24% or 36% of the total project area, depending on the use of curb and gutter. With this proposed rezoning to a general district, any use allowed in the HC district would be permitted on these parcels with limited built-upon area.

Location/Zoning
The parcel, located at 9173 Sherrills Ford Road and identified by parcel number 4617-09-16-3151, is in the Sherrills Ford area of the Comprehensive Land Use Plan. It is depicted as Parcel 1 on the attached maps, is zoned R-20 Residential, and is currently developed with a single-family home.

- *North* – Parcel 2 is zoned R-20 and is developed with a single-family home.
- *South* – Parcel 4 is zoned HC and is developed with a single-family home; Parcel 5 is zoned R-20 and is undeveloped.
- *East* – Parcel 3 is zoned Planned Development (PD) and is developed with the Sherrills Ford Terrell Branch Library.
- *West* – Parcel 6 is zoned R-20 and is currently under development for a 62-lot by-right single-family residential cluster subdivision, Highland Grove.

Parcel Zoning History
There is no pertinent zoning history for the subject property.

Land Use
The acreage of the parcel meets the minimum requirement for HC district (40,000 square feet). Uses allowed in the HC district include, but are not limited to, restaurants, office/retail, outdoor self-storage, and motor vehicle repair and sales. According to the submitted narrative, the applicant plans to build a 12,000 square-foot commercial building for a fitness center and an accountant office in the next 2-3 years. This application is for a general rezoning, and this specific proposal is not binding on the current or future property owner. If rezoned, this parcel can be developed with any permitted use in the HC district.

Utilities
Public water is located along Sherrills Ford Road. Public sewer availability will depend on the specific development proposal, the timing of that proposal, and access route to the sewer line,

Transportation

In 2025, the Average Annual Daily Trips on Sherrills Ford Road near the project totaled 6,700. The 2026-2035 State Transportation Improvement Program (NCSTIP) funds the widening of NC 150 Highway only for preliminary engineering. Designs for the intersection of Sherrills Ford Road and NC 150 widening have not been finalized to illustrate any potential impacts to this project. Transportation improvement projects associated with nearby development projects are required to be constructed along Sherrills Ford Road. Access for commercial development on this parcel is subject to review and approval by NCDOT. The traffic improvements and any final designs of NC 150 widening will be considered in the review by NCDOT for a commercial driveway.

Land Use Plan

Catawba County Comprehensive Plan's Future Land Use recommendation for this parcel is for Mixed Use/Commercial/Multifamily development. The requested zoning district is consistent with the adopted Comprehensive Plan. The plan also recommends the property be rezoned with the Mixed-Use Corridor Overlay (MUC-O) to include pedestrian oriented design standards.

Planning Board Public Hearing

The Planning Board held a public hearing on October 26, 2026 to consider the request. There were no questions from the board. No one spoke in opposition to the request.

STAFF RECOMMENDATION

Staff recommends and the Planning Board voted 8-0 to: 1) adopt the proposed Plan Consistency and Reasonableness Statement and 2) recommend the 1.51-acre parcel located at 9173 Sherrills Ford Road be rezoned from R-20 Residential to Highway Commercial (HC) district with based upon:

1) The Catawba County Comprehensive Plan Future Land Use Map's recommendation for Mixed Use/Commercial/Multifamily development on this parcel;
2) The property being in proximity to other Highway Commercial zoned parcels and nonresidential uses; and
3) The Catawba County Comprehensive Plan Future Overlay Map's recommendation for MUC-O zoning of this parcel.

Applicant

Petram Properties LLC

Request

Conduct a public hearing to consider rezoning a 1.5-acre parcel owned by the applicant from R-20 Residential to Highway Commercial (HC)

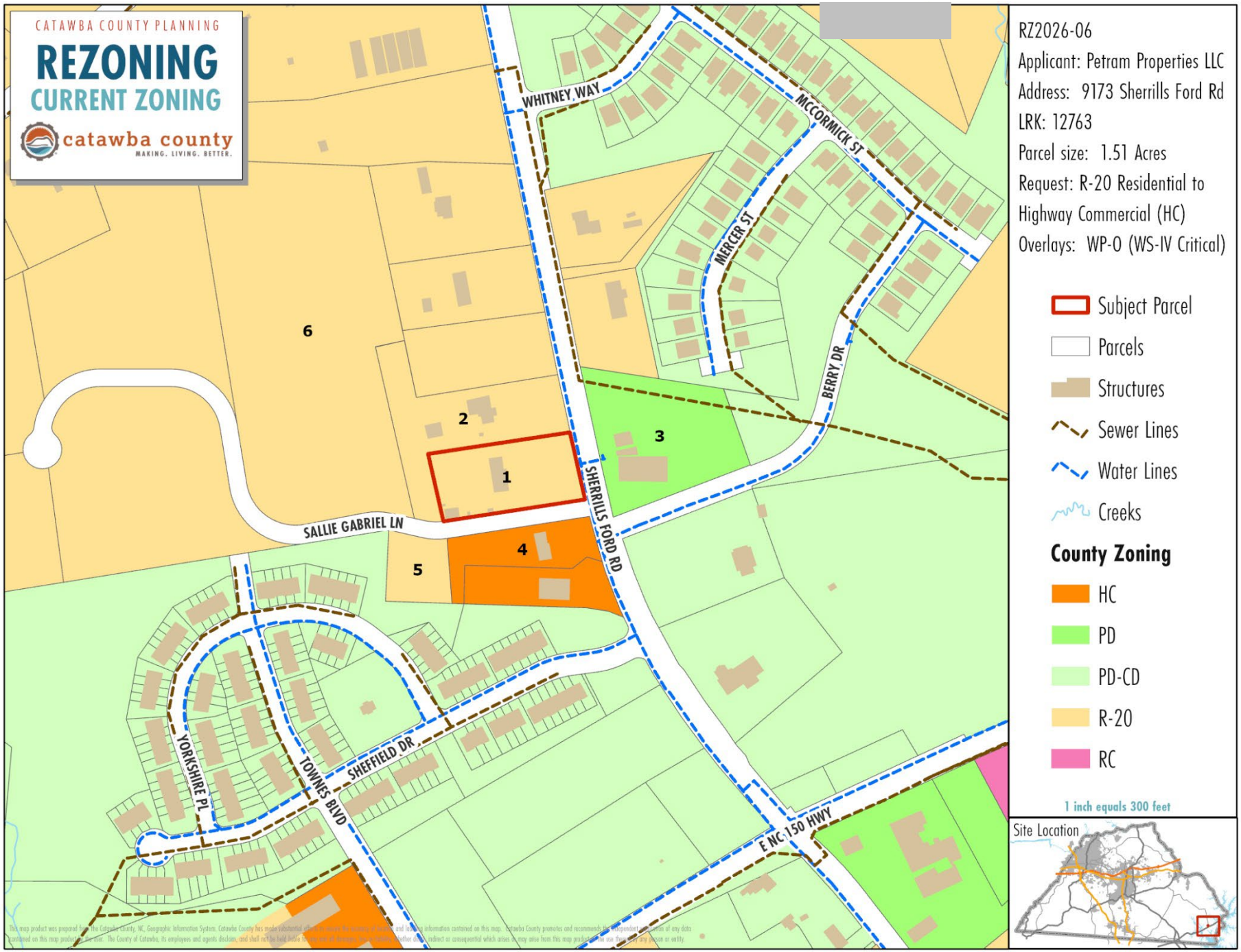
Location

9173 Sherrills Ford Road

PIN 4617-09-16-3151

Date

November 16, 2026


CATAWBA COUNTY PLANNING
REZONING
CURRENT ZONING
catawba county
MAKING. LIVING. BETTER.
WHITNEY WAY
MCCORMICK ST
MERCER ST
BERRY DR
SHERRILLS FORD RD
SALLIE GABRIEL LN
YORKSHIRE PL
TOWNES BLVD
SHEFFIELD DR
E NC 150 HWY
1
2
3
4
5
6
RZ2026-06
Applicant: Petram Properties LLC
Address: 9173 Sherrills Ford Rd
LRK: 12763
Parcel size: 1.51 Acres
Request: R-20 Residential to Highway Commercial (HC)
Overlays: WP-O (WS-IV Critical)
Subject Parcel
Parcels
Structures
Sewer Lines
Water Lines
Creeks
County Zoning
HC
PD
PD-CD
R-20
RC
1 inch equals 300 feet
Site Location

CATAWBA COUNTY PLANNING

REZONING

2025 AERIAL

catawba county
MAKING. LIVING. BETTER.



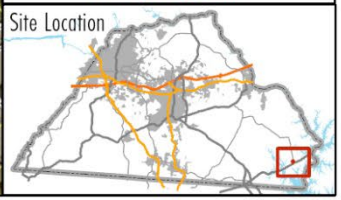
RZ2026-06
Applicant: Petram Properties LLC
Address: 9173 Sherrills Ford Rd
LRK: 12763
Parcel size: 1.51 Acres
Request: R-20 Residential to Highway Commercial (HC)
Overlays: WP-O (WS-IV Critical)

- Subject Parcel
- Parcels
- Sewer Lines
- Water Lines
- Creeks

NORTH

1 inch equals 300 feet

Site Location



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Subject Property

9173 Sherrills Ford Road





Adjacent Properties



Parcel 2 – 9155 Sherrills Ford Rd, zoned R-20

Parcel 4 – 9187 Sherrills Ford Rd, zoned HC



Adjacent Properties



Parcel 6 – under construction for a by-right major subdivision “Highland Grove”, zoned R-20



Note: Parcel 5, zoned R-20, is **undeveloped,** but is across from the subdivision construction. **No picture available.**

Adjacent Property



Parcel 3 – 9154 Sherrills Ford Road, zoned PD, Sherrills Ford Terrell Branch Library

Review – Purpose of Zoning District



The current R-20 Residential district requires a minimum lot size of 20,000 square feet (approx. 1/2 acre) and is considered a “general use” residential district. Prevailing uses for R-20 are single family homes and agriculture.



Highway Commercial district requires a minimum lot size of 40,000 sq ft (about 1 acre). This district provides areas for regional highway-oriented business, office, services and civic uses.

Review – Purpose of Overlay Zoning District



Watershed Protection Overlay (WP-O) addresses built upon area to protect water supply sources. This project is in the Protected Area of the watershed and is limited to 24 - 36% built upon area, depending on use of curb and gutter.



Mixed Use Corridor Overlay (MUC-O) limits some commercial uses, establishes appearance criteria, and pedestrian design for development within the overlay.

Background

- No significant zoning history on this property
  - Property was zoned residential prior to 2007

Rezoning Request

- Current rezoning request is for a general zoning district, Highway Commercial. All uses allowed the HC district may be permitted.
- According to the narrative, the applicant would like to develop the property with a fitness center and an accounting office in 2-3 years.
- If the rezoning is approved, any future commercial development will have to meet all UDO standards for site development in HC and WP-O.
- The parcel meets the minimum lot size for the HC district.

Utilities

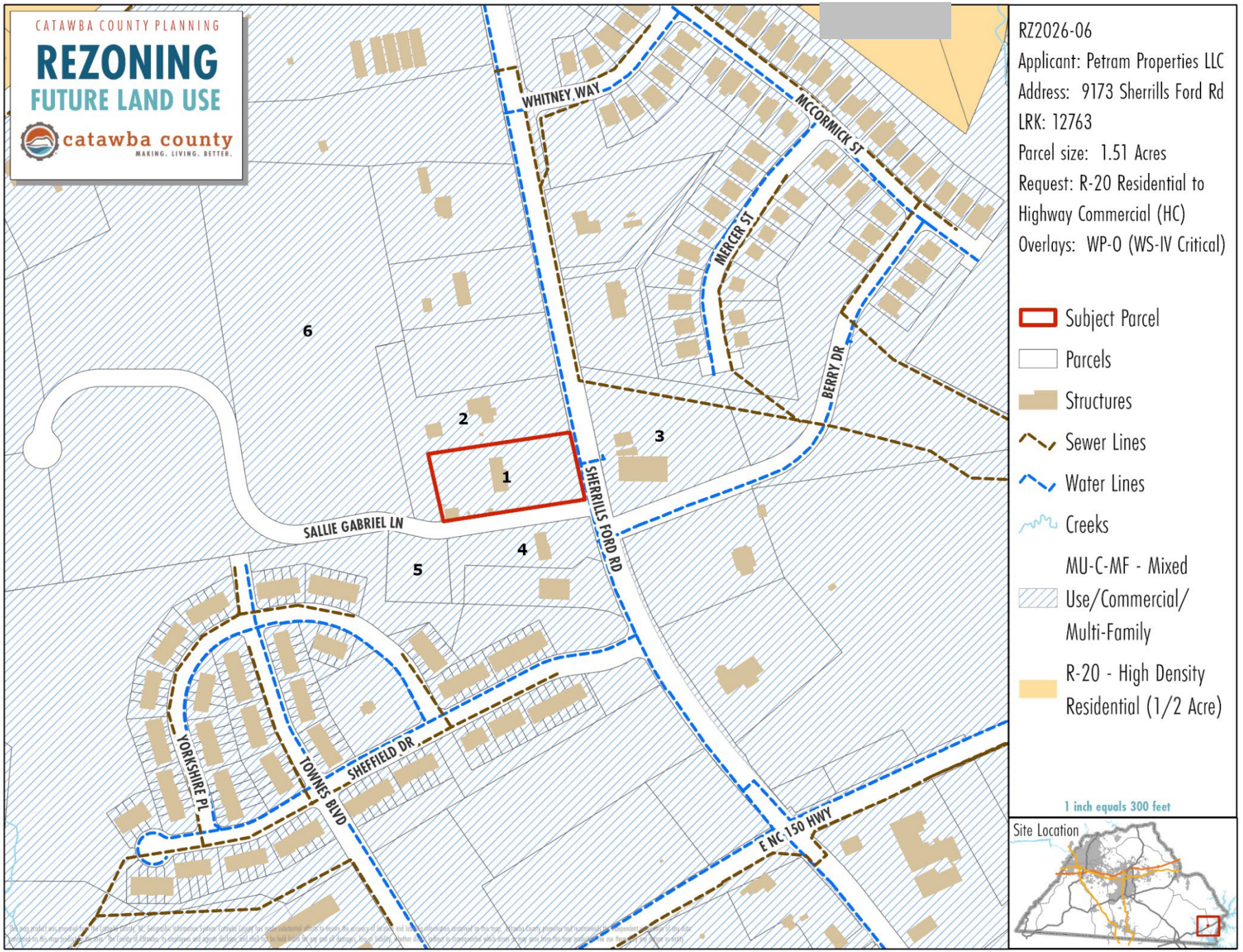
- Water is available on NC 150
- Sewer is located on NC 150 near this parcel
  - Sewer availability will depend on specific development proposal and timing of that development, when put forward.
  - Current dwelling on the parcel is served by on-site septic.

Transportation

- In 2025, daily trips on Sherrills Ford Rd measures 6,700 near the project property.
- The 2026-2035 State Transportation Improvement Program (NCSTIP) funds the widening of NC 150 Highway only for preliminary engineering.
  - Design of NC 150 widening is not finalized;
  - Impacts to Sherrills Ford Rd intersection not known.
- Road improvements associated with Terrell Town Center TIA (2022) will be implemented with current construction projects in this vicinity.
- Commercial driveway access will require review and approval from NCDOT.

Land Use Plan

- The Catawba County Comprehensive Plan was adopted in April 2024.
- Future Land Use Map denotes Mixed Use/Multifamily/Commercial for these parcels.
- Future Overlay Map designates the Mixed-Use Corridor Overlay (MUC-O) be expanded to include commercial development on this parcel.
  - As parcels are rezoned for Mixed Use/Multifamily /Commercial in this area, the parcels should be included in the MUC-O (design standards, pedestrian focus).


CATAWBA COUNTY PLANNING
REZONING
FUTURE LAND USE
catawba county
MAKING. LIVING. BETTER.
WHITNEY WAY
MCCORMICK ST
MERCER ST
BERRY DR
SHERRILLS FORD RD
SALLIE GABRIEL LN
YORKSHIRE PL
TOWNES BLVD
SHEFFIELD DR
E NC 150 HWY
1
2
3
4
5
6
RZ2026-06
Applicant: Petram Properties LLC
Address: 9173 Sherrills Ford Rd
LRK: 12763
Parcel size: 1.51 Acres
Request: R-20 Residential to Highway Commercial (HC)
Overlays: WP-O (WS-IV Critical)
Subject Parcel
Parcels
Structures
Sewer Lines
Water Lines
Creeks
MU-C-MF - Mixed Use/Commercial/ Multi-Family
R-20 - High Density Residential (1/2 Acre)
1 inch equals 300 feet
Site Location

CATAWBA COUNTY PLANNING

REZONING

FUTURE OVERLAY DISTRICTS

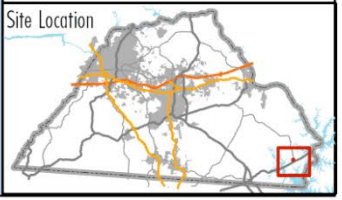
catawba county
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RZ2026-06
Applicant: Petram Properties LLC
Address: 9173 Sherrills Ford Rd
LRK: 12763
Parcel size: 1.51 Acres
Request: R-20 Residential to Highway Commercial (HC)
Overlay: WP-O

- Subject Parcel
- Parcels
- Structures
- Railroads
- Current MUC-O
- GI - General Industrial
- Future MUC-O
- PD - Planned Development
- High Density Residential (1/2 Acre)
- Medium Density Residential (3/4 Acre)

1 inch equals 1,500 feet

Site Location



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Planning Board Public Hearing

- Public Hearing on October 26, 2026
- There was no opposition of the request.

Planning Board and Staff Recommendation

Staff recommends and the Planning Board voted 8-0 to: 1) adopt the proposed Plan Consistency and Reasonableness Statement and 2) recommend the 1.5-acre parcel located at 9173 Sherrills Ford Road be rezoned from R-20 Residential to Highway Commercial (HC) district with Mixed-Use Corridor Overlay (MUC-O) based on:

1) The Catawba County Comprehensive Plan Future Land Use Map's recommendation for Mixed-Use/Commercial/Multifamily on these parcels;
2) The property being surrounded by Highway Commercial zoned parcels and nonresidential uses; and
3) The Catawba County Comprehensive Plan Future Overlay Map's recommendation for MUC-O zoning of this parcel.

Label	bldg_no	street_name	lrk	owner	owner.address	owner.city	owner.state
1	9173	SHERRILLS FORD RD	12763	PETRAM PROPERTIES LLC	7825 NC HIGHWAY 150 E STE 6020	TERRELL	NC
2	9155	SHERRILLS FORD RD	12761	LINEBERGER CARROLL G SR	PO BOX 385	TERRELL	NC
3	9154	SHERRILLS FORD RD	803824	CATAWBA COUNTY	PO BOX 389	NEWTON	NC
4	9187	SHERRILLS FORD RD	803059	BOLO HOLDINGS LLC	290 N NC 16 BUSINESS HWY STE C	DENVER	NC
5		SALLIE GABRIEL LN	803060	JONES GARY SCOTT	777 HOPEWELL CHURCH RD	CATAWBA	NC
6	8098	SALLIE GABRIEL LN	802558	LANDMARK PARCELS AT SALLIE GABRIEL LLC	101 S TRYON ST STE 2110	CHARLOTTE	NC

Catawba County Rezoning/Ordinance Text Amendment Application

Applicant Petram Properties, LLC Phone # 704.472.4162
Applicant's Fax 828.882.2245 Applicant's Email Matt@mcijcpa.com
Applicant's Mailing Address 7825 NC Hwy 150 E - Ste 6 City, State, Zip Terrell, NC 28682
Property Owner Same Phone # Same
Property Owner's Mailing Address Same City, State, Zip Same
Parcel 911 Address 9173 Sherrills Ford Rd - Terrell PIN # 4617091631S1
Subdivision Name and Lot # N/A
Is property currently within a Voluntary Agricultural District (VAD) or an Enhanced Voluntary Agricultural District (EVAD):
Yes ____ No ✓
Current Zoning District R-20 Proposed Zoning District HC

Type of Rezoning Application:

☒ **General Rezoning**
- The general information listed below shall be submitted with the rezoning application.

☐ **Planned Development (PD)/Special District (i.e. 321-ED-MX) Rezoning**
- All information contained in the Planned Development Chart and/or Special District Chart of the Procedures Manual is to be shown on a plan submitted with the application and the general information below.

☐ **Conditional District Rezoning**
- All information contained in the Conditional District Development Chart of the Procedures Manual is to be shown on a plan submitted with the application. The complete application includes the general information below and specific development conditions substantially agreed to by the staff and applicant as well as a development agreement if applicable.

☐ **Manufactured Home Park Rezoning**
- All information contained in the Manufactured Home Park Development Chart of the Procedures Manual is to be shown on a plan submitted with the application and the general information below.
- Proposed Park Name _____

☐ **Ordinance Text Amendment**
- Submit general information listed below.

General Information to be attached:

☐ If a portion of an existing parcel is requested to be rezoned, a survey of the portion of the parcel(s) covered by the proposed amendment at a scale no smaller than 1 inch equals 200 feet, on a 18 x 24 inch map and one 8 x 11 inch map (30 copies).
☑ Submittal of 20 copies of each map including digital copies in .pdf or .jpg format.
☐ If applicable, a legal description of such land
☐ If applicable, a detailed statement of any alleged error in the Unified Development Ordinance which would be corrected by the proposed amendment, and a detailed explanation of the manner the proposed amendment will correct the alleged error.
☑ A detailed statement of all other circumstances, factors, and reasons, which applicant offers in support of the proposed zoning map or text amendment.
☑ Filing Fee: Per Catawba County Fee Schedule

Applicant's Name (Printed) Petram Properties, LLC - Matt Coffey Member/Mgr
Applicant's Signature Matt Coffey Date 9-11-26
Property Owners Name (Printed) Same
Property Owner's Signature _____ Date _____

Mr. Chris Timberlake
Catawba County Senior Planner
25 Government Drive
Newton, NC 28658

Subject: Application for Catawba County Rezoning

Dear Mr. Timberlake:

Matt Coffey, the owner of Pure Fitness, Inc and Coffey & Johnson, CPA-PLLC are applying to have the 1.510-acre property owned by Petram Properties, LLC and located at 9173 Sherrills Ford Rd, Terrell (PIN# 461709163151) rezoned. The current zoning designation is R-20. The requested zoning is HC or O-I if HC is not an option. The requested rezoning is intended for the construction of a new fitness center and offices for a CPA firm to meet the needs of the growing population around Sherrills Ford and Terrell

ABOUT US

Pure Fitness 24/7 opened in Terrell in 2008 by local graduates of Bandys High School. We currently have approximately 900 members that live in the adjoining communities. We offer a state-of-the-art facility with top-grade equipment, approximately 26 group fitness classes, top notch athletic trainers and a full-service smoothie bar. We currently have 8 full and part-time employees and another 10 trainers and instructors who work as independent contractors. Pure Fitness has been an integral part of the Sherrills Ford and Terrell Communities and a good neighbor for almost 20 years. We are a place where locals from the community of health and fitness minded people gather, belong and create lifetime friendships. We provide a deeply needed service to our community. We know this community because we were raised in this community! Our roots are deep here, we support the local Catawba County schools and we want to continue creating an atmosphere where people go to belong and stay healthy for the next 50 years!

Coffey & Johnson, CPA-PLLC opened in Terrell in 2008. We provide the Lake Norman area with Individual, Corporate and Partnership tax preparation, planning and consulting. We also provide accounting, payroll and financial planning. We currently have 6 employees and need additional space for growth. We provide accounting services to over 800 clients in the Lake Norman area.

Project Description

The proposed project, to be completed within the next 2 to 3 years, would be to construct a building around 12,000 square feet. This property would have office space of approximately 2,000 square feet for the CPA firm and the remainder of the square footage would be used for the fitness center. Additionally, we would like to develop outdoor green space for outdoor workouts and a running track. The property has approximately 180 feet of frontage on Hwy 150 on Sherrills Ford Rd. The Catawba County Library is across the road, Phoenix Physical Therapy is two lots up (formerly Long Island Marina boat sales).

Sincerely,

Matt Coffey
Owner of Pure Fitness, Inc and Matt Coffey, CPA-PLLC

704.230.1685 PHONE • 828.412.4410 FAX • PUREFIT247@GMAIL.COM EMAIL • 7825 NC HWY 150 EAST • SUITE 5 • TERRELL, NC • 28682
WWW.PUREFITNESS24-7.COM

Ordinance No. 2026-_____

AMENDMENT TO THE CATAWBA COUNTY ZONING MAP

BE IT ORDAINED, BY THE BOARD OF COMMISSIONERS, that the Catawba County Official Zoning Atlas is hereby amended by rezoning the below described property from R-20 Residential to Highway Commercial (HC).

One parcel totaling 1.51-acres, located at 9173 Sherrills Ford Road and identified by Parcel Identification Number 4617-09-16-3151.

This, the 16th day of November 2026.

_____
C. Randall Isenhower, Chair

catawba county
planning

CATAWBA COUNTY BOARD OF COMMISSIONERS

PROPOSED PLAN CONSISTENCY AND REASONABLENESS STATEMENT

Zoning Amendment Request: To rezone a 1.51-acre parcel located at 9173 Sherrills Ford Road, identified by Parcel Identification Number 4617-09-16-3151, from R-20 Residential (R-20) to Highway Commercial (HC) and Mixed-Use Corridor Overlay (MUC-O).

The Catawba County Board of Commissioners finds the request to be consistent with the Catawba County Comprehensive Plan's Future Land Use Map recommendation of mixed use / commercial / multifamily development on these parcels.

Pursuant to NCGS 160D-605, the Board of Commissioners finds the rezoning request reasonable and in the public's interest based upon:

1. The Catawba County Comprehensive Plan Future Land Use Map's recommendation for Mixed Use/Commercial/Multifamily development on this parcel;
2. The property being in proximity to other Highway Commercial zoned parcels and nonresidential uses; and
3. The Catawba County Comprehensive Plan Future Overlay Map's recommendation for Mixed Use Corridor Overlay (MUC-O) zoning of this parcel.

By a vote of _____, the Catawba County Board of Commissioners approves the rezoning request.

This the 16th day of November 2026.

_____
C. Randall Isenhower, Chair

Applicant

Petram Properties LLC

Request

Conduct a public hearing to consider rezoning a 1.5-acre parcel owned by the applicant from R-20 Residential to Highway Commercial (HC)

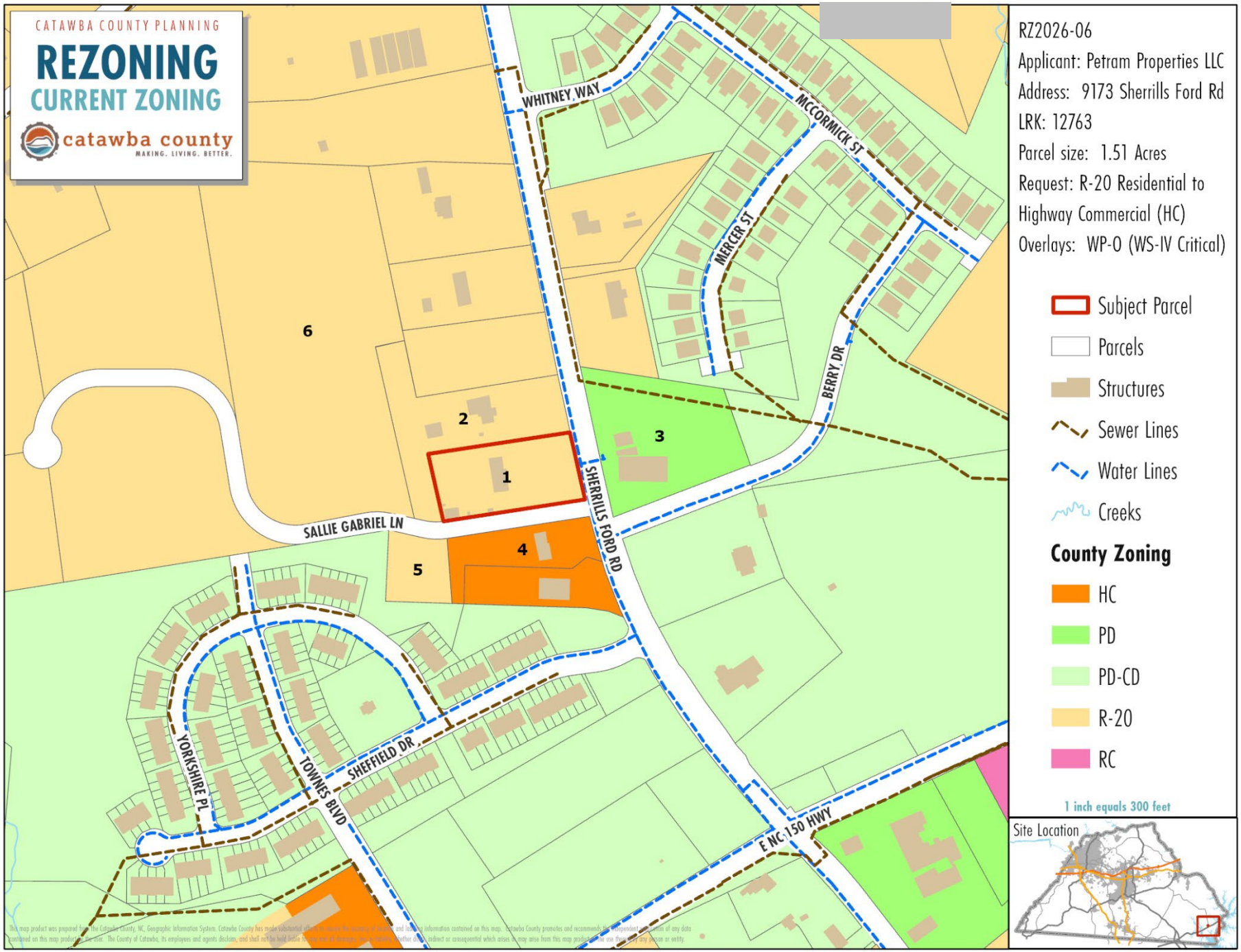
Location

9173 Sherrills Ford Road

PIN 4617-09-16-3151

Date

November 16, 2026


CATAWBA COUNTY PLANNING
REZONING
CURRENT ZONING
catawba county
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WHITNEY WAY
MCCORMICK ST
MERCER ST
BERRY DR
SHERRILLS FORD RD
SALLIE GABRIEL LN
YORKSHIRE PL
TOWNES BLVD
SHEFFIELD DR
E NC 150 HWY
1
2
3
4
5
6
RZ2026-06
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Parcel size: 1.51 Acres
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Overlays: WP-O (WS-IV Critical)
Subject Parcel
Parcels
Structures
Sewer Lines
Water Lines
Creeks
County Zoning
HC
PD
PD-CD
R-20
RC
1 inch equals 300 feet
Site Location

CATAWBA COUNTY PLANNING

REZONING

2025 AERIAL

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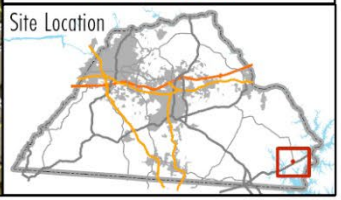
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- Subject Parcel
- Parcels
- Sewer Lines
- Water Lines
- Creeks

NORTH

1 inch equals 300 feet

Site Location



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Subject Property

9173 Sherrills Ford Road





Adjacent Properties



Parcel 2 – 9155 Sherrills Ford Rd, zoned R-20

Parcel 4 – 9187 Sherrills Ford Rd, zoned HC



Adjacent Properties



Parcel 6 – under construction for a by-right major subdivision “Highland Grove”, zoned R-20



Note: Parcel 5, zoned R-20, is **undeveloped,** but is across from the subdivision construction. **No picture available.**

Adjacent Property



Parcel 3 – 9154 Sherrills Ford Road, zoned PD, Sherrills Ford Terrell Branch Library

Review – Purpose of Zoning District



The current R-20 Residential district requires a minimum lot size of 20,000 square feet (approx. 1/2 acre) and is considered a “general use” residential district. Prevailing uses for R-20 are single family homes and agriculture.



Highway Commercial district requires a minimum lot size of 40,000 sq ft (about 1 acre). This district provides areas for regional highway-oriented business, office, services and civic uses.

Review – Purpose of Overlay Zoning District



Watershed Protection Overlay (WP-O) addresses built upon area to protect water supply sources. This project is in the Protected Area of the watershed and is limited to 24 - 36% built upon area, depending on use of curb and gutter.



Mixed Use Corridor Overlay (MUC-O) limits some commercial uses, establishes appearance criteria, and pedestrian design for development within the overlay.

Background

- No significant zoning history on this property
  - Property was zoned residential prior to 2007

Rezoning Request

- Current rezoning request is for a general zoning district, Highway Commercial. All uses allowed the HC district may be permitted.
- According to the narrative, the applicant would like to develop the property with a fitness center and an accounting office in 2-3 years.
- If the rezoning is approved, any future commercial development will have to meet all UDO standards for site development in HC and WP-O.
- The parcel meets the minimum lot size for the HC district.

Utilities

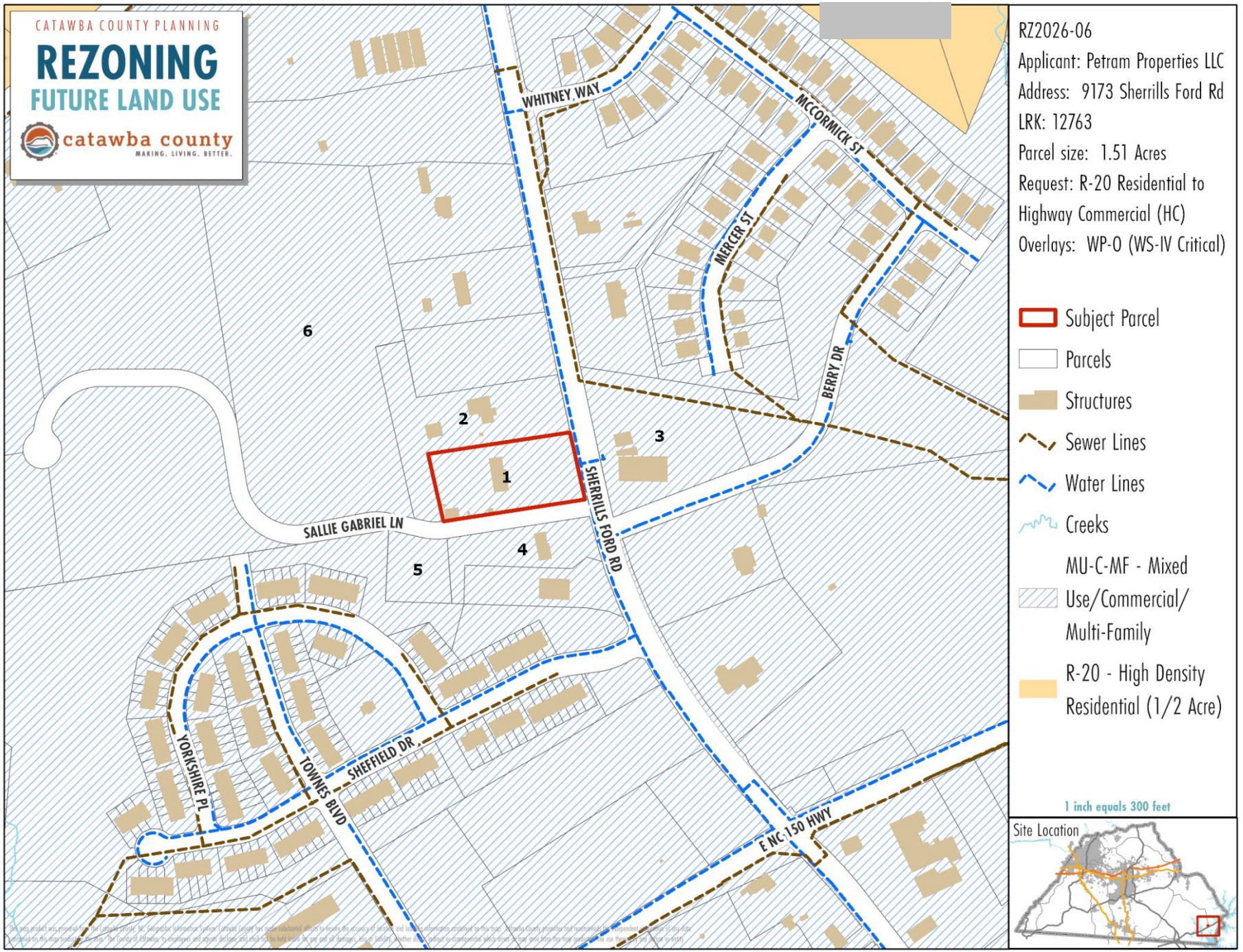
- Water is available on NC 150
- Sewer is located on NC 150 near this parcel
  - Sewer availability will depend on specific development proposal and timing of that development, when put forward.
  - Current dwelling on the parcel is served by on-site septic.

Transportation

- In 2025, daily trips on Sherrills Ford Rd measures 6,700 near the project property.
- The 2026-2035 State Transportation Improvement Program (NCSTIP) funds the widening of NC 150 Highway only for preliminary engineering.
  - Design of NC 150 widening is not finalized;
  - Impacts to Sherrills Ford Rd intersection not known.
- Road improvements associated with Terrell Town Center TIA (2022) will be implemented with current construction projects in this vicinity.
- Commercial driveway access will require review and approval from NCDOT.

Land Use Plan

- The Catawba County Comprehensive Plan was adopted in April 2024.
- Future Land Use Map denotes Mixed Use/Multifamily/Commercial for these parcels.
- Future Overlay Map designates the Mixed-Use Corridor Overlay (MUC-O) be expanded to include commercial development on this parcel.
  - As parcels are rezoned for Mixed Use/Multifamily /Commercial in this area, the parcels should be included in the MUC-O (design standards, pedestrian focus).


CATAWBA COUNTY PLANNING
REZONING
FUTURE LAND USE
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WHITNEY WAY
MCCORMICK ST
MERCER ST
BERRY DR
SHERRILLS FORD RD
SALLIE GABRIEL LN
YORKSHIRE PL
TOWNES BLVD
SHEFFIELD DR
E NC 150 HWY
1
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Overlays: WP-O (WS-IV Critical)
Subject Parcel
Parcels
Structures
Sewer Lines
Water Lines
Creeks
MU-C-MF - Mixed Use/Commercial/ Multi-Family
R-20 - High Density Residential (1/2 Acre)
1 inch equals 300 feet
Site Location

CATAWBA COUNTY PLANNING

REZONING

FUTURE OVERLAY DISTRICTS

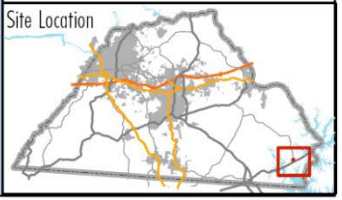
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Planning Board Public Hearing

- Public Hearing on October 26, 2026
- There was no opposition of the request.

Planning Board and Staff Recommendation

Staff recommends and the Planning Board voted 8-0 to: 1) adopt the proposed Plan Consistency and Reasonableness Statement and 2) recommend the 1.5-acre parcel located at 9173 Sherrills Ford Road be rezoned from R-20 Residential to Highway Commercial (HC) district with Mixed-Use Corridor Overlay (MUC-O) based on:

1) The Catawba County Comprehensive Plan Future Land Use Map's recommendation for Mixed-Use/Commercial/Multifamily on these parcels;
2) The property being surrounded by Highway Commercial zoned parcels and nonresidential uses; and
3) The Catawba County Comprehensive Plan Future Overlay Map's recommendation for MUC-O zoning of this parcel.

MEMORANDUM

TO: Catawba County Board of Commissioners
FROM: Jon Pilkenton, Planner
DATE: November 16, 2026
IN RE: Rezoning Request update a Planned Development (PD)

REQUEST
Board of Commissioners to hold a public hearing to consider an application to rezone a 6.78-acre parcel located at 5851 St Peters Church Road to update its existing Planned Development (PD) approval to accommodate addition of an outdoor storage facility (self-storage) on the undeveloped western side of the property.

REVIEW/BACKGROUND
A PD district is required when the aggregate square footage of the nonresidential building(s) on a single zoning lot exceeds 50,000 square feet gross leasable area. A concept site plan is required and must provide a unified and well-organized arrangement of buildings. The approved site plan for the existing PD depicts a tire and automotive repair facility – Sig's Tire – on the site. This plan does not include the proposed outdoor storage facility and would need to be amended to accommodate the storage.

Location/Zoning
The parcel is located at 5851 St. Peters Church Road and is currently zoned Planned Development (PD).

- *North* – Parcels 2-4 are zoned R-20. All 3 parcels are developed with single-family homes.
- *South* – Parcels 9-11 are zoned R-20. Parcel 9 is developed with a single-family home, Parcel 10 is undeveloped and Parcel 11 is developed with a nonconforming small office.
- *East* – Parcels 5-8 are zoned R-20. All are developed with single-family homes.
- *West* – Parcel 12 is zoned R-20 and is undeveloped.

Parcel Zoning History
The parcel was originally rezoned to Planned Development Mixed Use (PD-MU) in 2001. This zoning district transitioned to PD with adoption of the 2007 Unified Development Ordinance (UDO).

Land Use
The acreage of the parcel meets the minimum requirements for PD district (80,000 square feet). An outdoor storage facility is an allowed use in the PD district. The updated concept plan that includes the outdoor storage facility meets the standards required by the UDO, including setbacks from residential districts and setbacks from public streets.

The applicant is proposing to add a 13,900 square foot outdoor storage facility to the concept site plan. The plan illustrates landscape buffering between the subject parcel and the residentially zoned adjacent properties. Since the applicant owns property on the western side of the subject parcel, the waiver option to not extend the buffer the entire length of the property line will be used. Landscaping along the front of the property and foundations facing the street right-of-way are proposed in accordance with the Unified Development Ordinance. Building facades visible from public rights-of-way are proposed to meet the building construction standards for PD; ribbed vinyl, metal material, or unpainted cinderblock is not allowed. The maximum permitted floor area ratio in a planned development district is 1:2. The proposed development along with the existing structures will not exceed the 1:2 floor area ratio.

Utilities
The current development is connected to public water along Springs Road and served by on-site septic.

Transportation
Springs Road is considered a minor arterial road within the NCDOT maintenance system. In 2025, the Annual Average Daily Traffic on Springs Road near the project was 9,400. St. Peters Church Road had an average daily traffic rate of 4,900 vehicles per day in 2025. This portion of Springs Road does not have any projects in the State Transportation Improvement Program (2026-2035) or the Metropolitan Transportation Plan (2050 Horizon year). In the Greater Hickory Comprehensive Transportation Plan, Springs Road is designated for widening to four lanes from Charlotte Street to NC Highway 16 beyond the 2050-time horizon.

Land Use Plan
The Catawba County Comprehensive Plan's Future Land Use recommendation for this parcel is for Planned Development. This is in an area designated as a Highway Commercial node as identified on the St. Stephens Oxford Future Land Use Map. The requested zoning district is consistent with the adopted Comprehensive Plan.

Planning Board Public Hearing
The Planning Board held a public hearing on October 26, 2026 to consider the request. There were no questions from the Planning Board. The applicant and one citizen spoke in support of the request.

STAFF RECOMMENDATION
Staff recommends and the Planning Board voted 8-0 to: 1) adopt the proposed Plan Consistency and Reasonableness Statement and 2) recommend approval of the amended Planned Development and concept site plan to allow the development of the outdoor storage facility, based upon:

1) The Catawba County Comprehensive Plan Future Land Use Map's recommendation for Planned Development on this parcel;
2) The parcel being located within a Highway Commercial node as identified in the St. Stephens/Oxford Future Land Use Map; and
3) The existing commercial development within the previously approved Planned Development.

Applicant

Herman Wilson Sigmon

Request

Conduct a public hearing to consider updating Planned Development (PD) district and concept site plan to include an outdoor storage facility (self-storage) on the undeveloped western side of the property.

Location

5851 St Peters Church Rd

PIN 3745-18-21-5364

Date

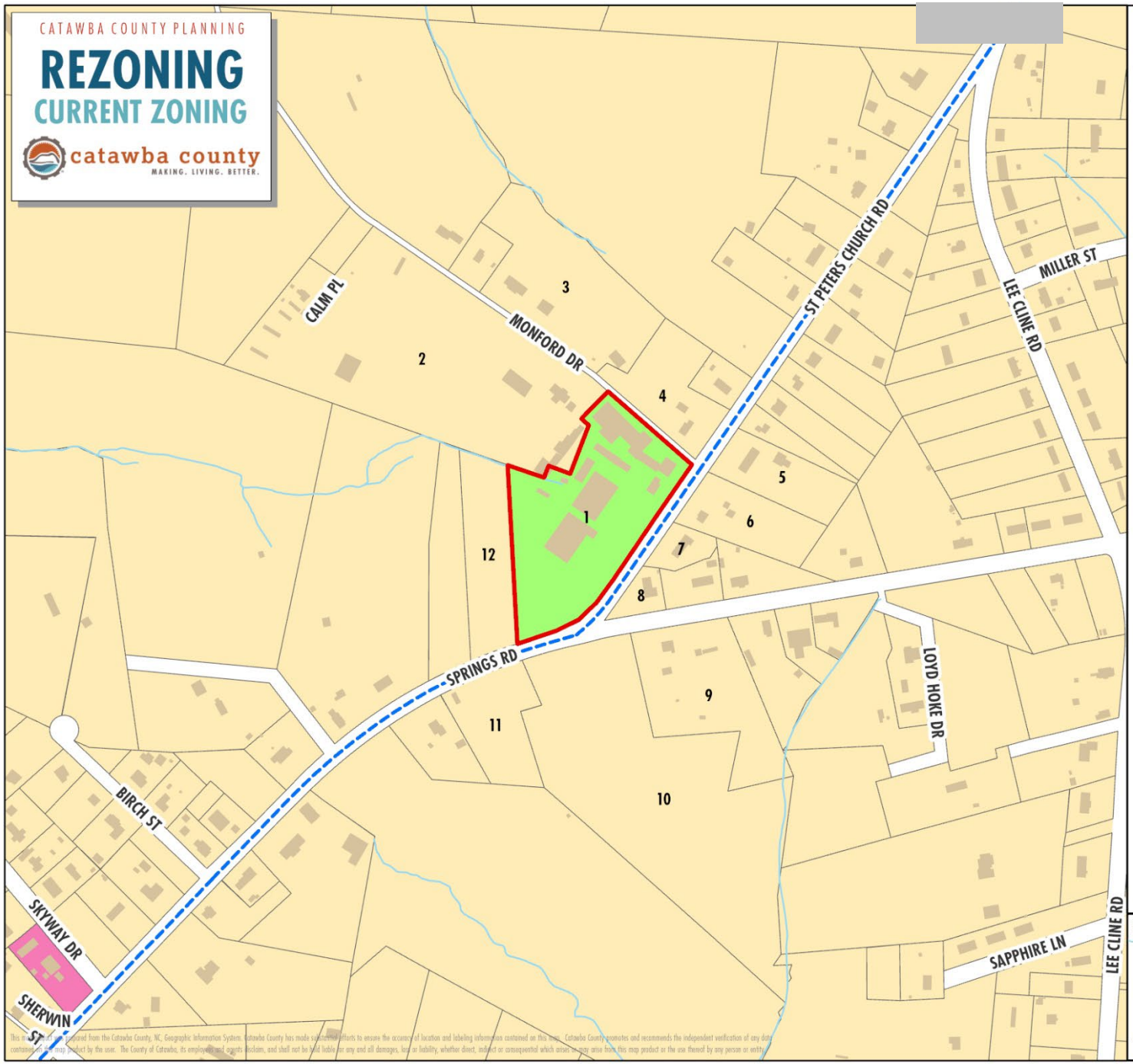
November 16, 2026

CATAWBA COUNTY PLANNING

REZONING

CURRENT ZONING

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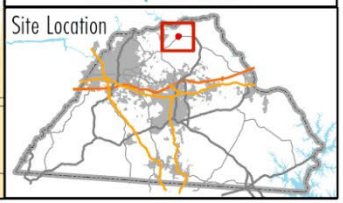
RZ2026-07
Applicant: Herman Wilson Sigmon Jr
Address: 5851 St Peter's Church Rd
LRK: 40676
Parcel size: 6.78 Acres
Request: Planned Development (PD) to Planned Development (PD) - amendment to existing PD

Subject Parcel
Parcels
Structures
Water Lines
Creeks

County Zoning

PD
R-20
RC

1 inch equals 450 feet



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CATAWBA COUNTY PLANNING

REZONING

2025 AERIAL

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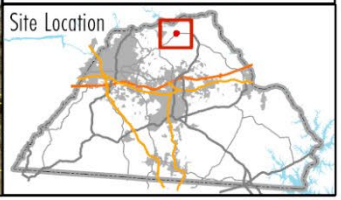
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Parcels
Water Lines
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NORTH

1 inch equals 450 feet

Site Location



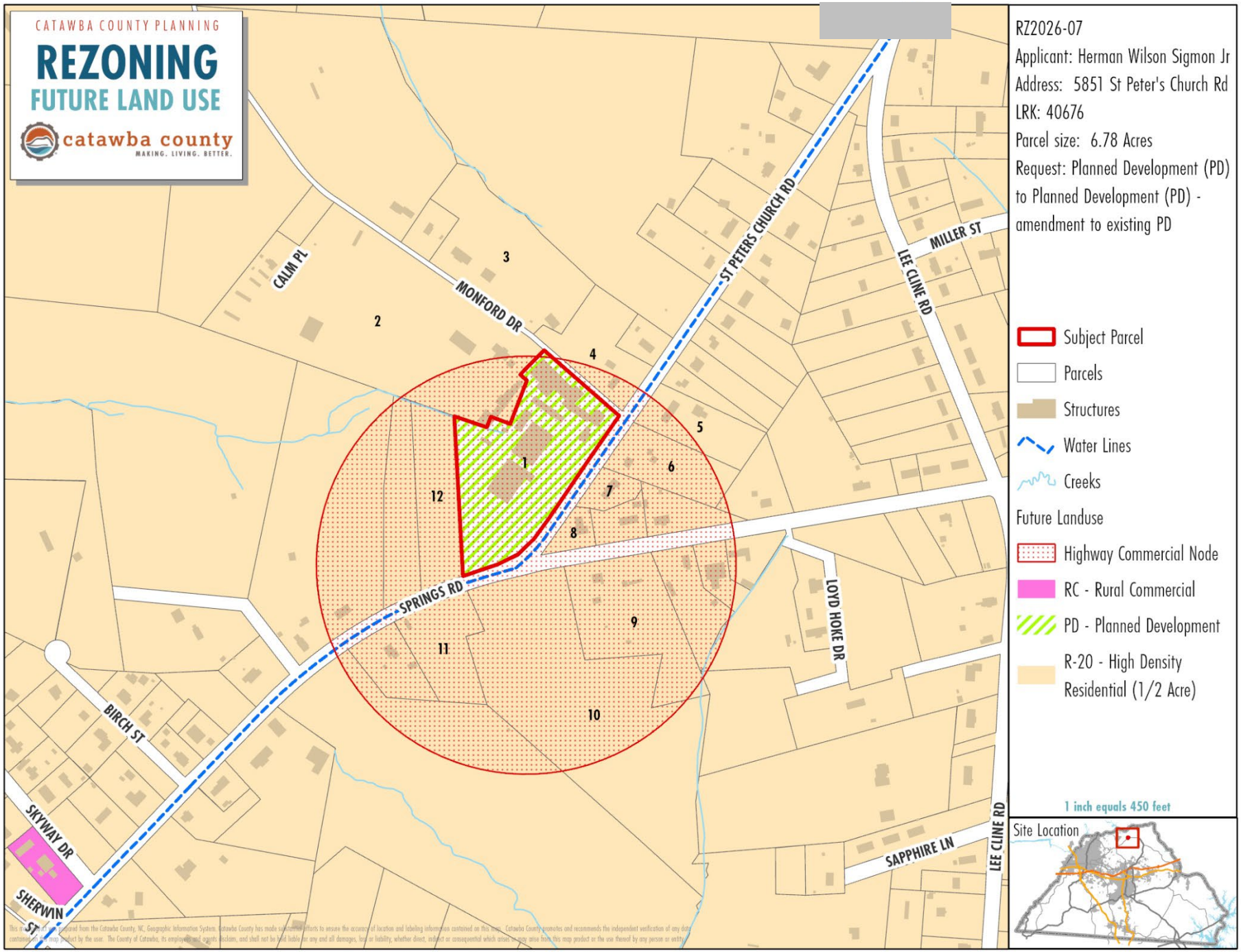
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- Subject Parcel
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- Creeks

Future Landuse

- Highway Commercial Node
- RC - Rural Commercial
- PD - Planned Development
- R-20 - High Density Residential (1/2 Acre)

1 inch equals 450 feet

Site Location

This map was prepared from the Catawba County, NC, Geographic Information System. Catawba County has made substantial efforts to ensure the accuracy of location and labeling information contained on this map. Catawba County promotes and recommends the independent verification of any data contained on this map product by the user. The County of Catawba, its employees and agents disclaim, and shall not be held liable for any and all damages, loss or liability, whether direct, indirect or consequential which arises or may arise from this map product or the use thereof by any person or entity.



Subject Property

5851 St. Peters Ch. Rd



Adjacent Properties - Monford Dr



Parcel #2- Residential Behind Subject Parcel, owned by applicant



Parcel #3 , 5900 Monford Dr, owned by applicant

Adjacent Properties – St. Peters Ch. Rd



Parcel #4, 5873 St Peters Ch. Rd



Parcel #5, 5860 St Peters Ch. Rd

Adjacent Properties – St Peters Ch. Rd



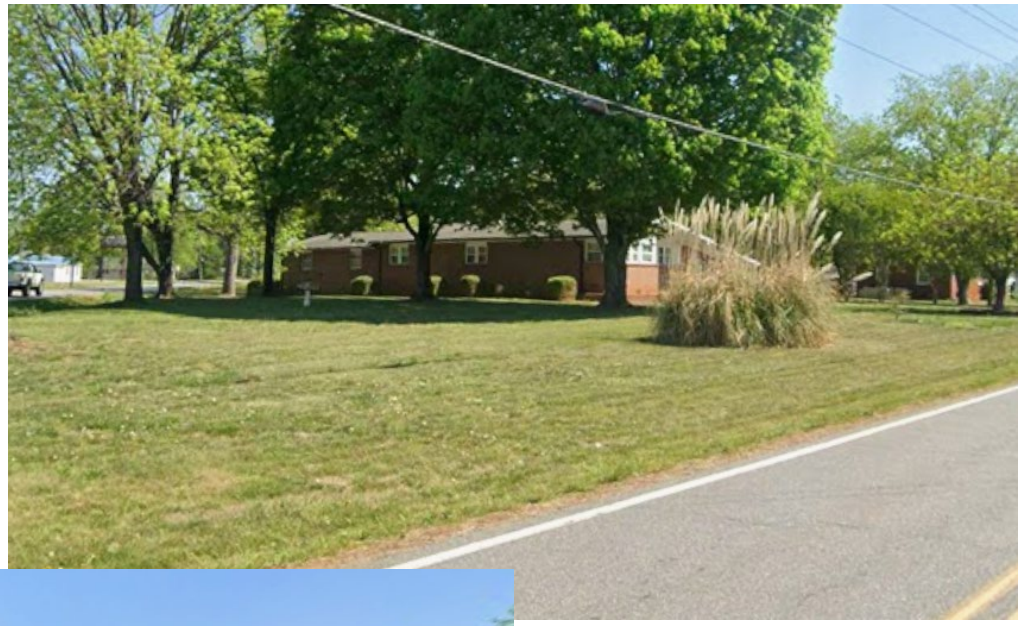
Parcel #6, 5865 St. Peters Ch. Rd



Parcel #7, 5861 St Peters Ch. Rd

Adjacent Properties – Springs Rd

Parcel #8, 5091
Springs Rd





Parcel #9, 4837
Springs Rd

Adjacent Properties – Springs Rd

Parcel #10, Springs Rd





Parcel #11, 5030 Springs Rd

Adjacent Properties –Springs Rd

Parcel #12, Springs Rd - Owned by Applicant



Review – Purpose of Zoning District



The planned development district is established to encourage the master planning of large scale, multiple and/or mixed-use development patterns.



A PD district is required when the aggregate square footage of the nonresidential building(s) on a single zoning lot exceeds 50,000 square feet gross leasable area. A concept site plan is required and must provide a unified and well-organized arrangement of buildings.



PD site plans must provide a unified and well organized arrangement of buildings, service area, parking, pedestrian and landscaped common areas. Commercial buildings must be grouped in relation to parking areas.

Rezoning Request

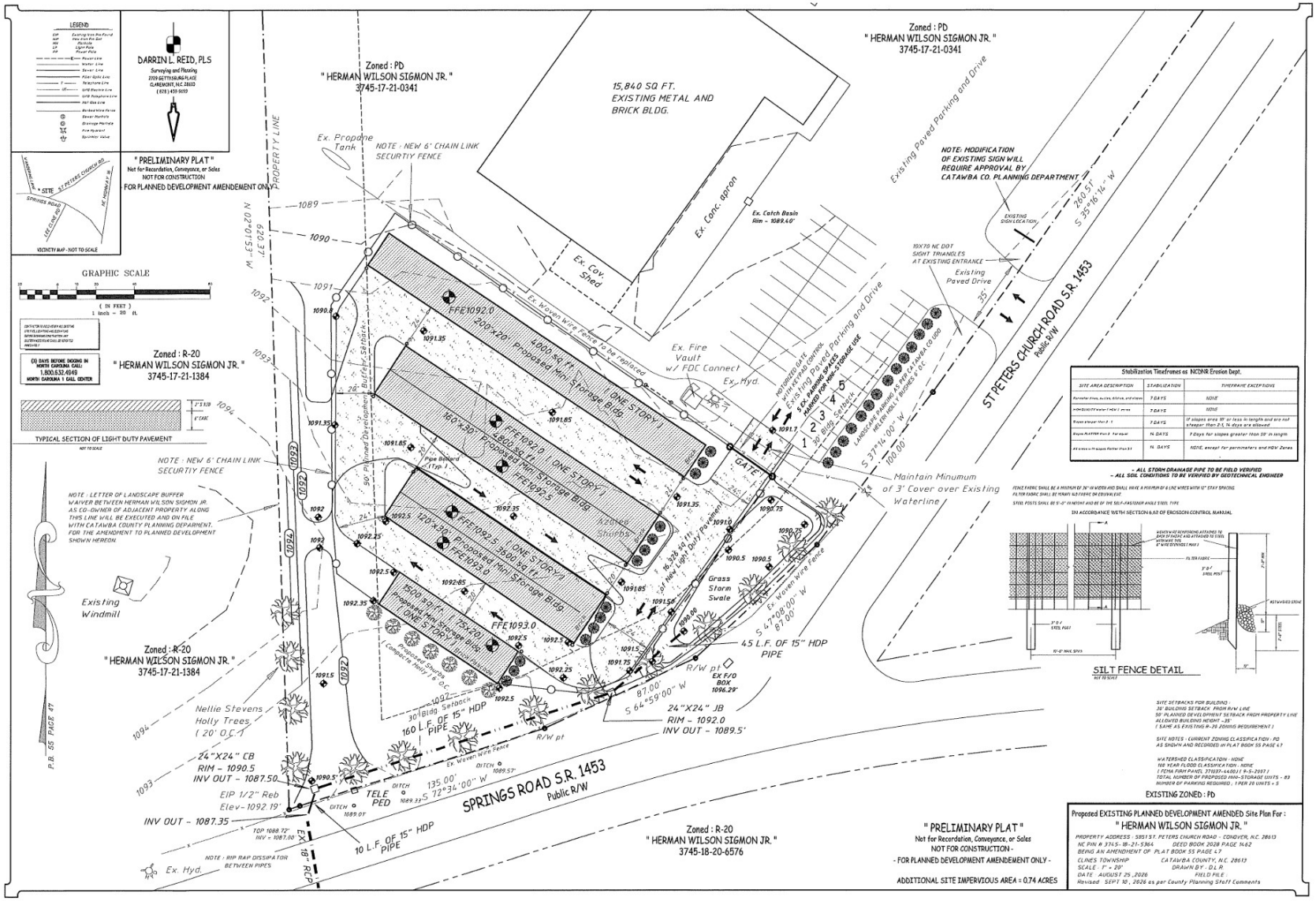
Background

- Applicant owns Sig's Tire located on the subject property.
- Subject property was originally rezoned to Planned Development Mixed-Use (PD-MU) in 2001. This zoning district transitioned to Planned Development (PD) with the 2007 Unified Development Ordinance (UDO).
- Rezoning request is to allow amending the existing PD for the applicant to develop an outdoor storage facility.
- Outdoor Storage Facility is approximately 13,900 square feet in size and consists of 4 individual buildings.

Rezoning Request

- Concept site plan meets the requirements for Planned Development District.

Planned Development Plan



Utilities

- Water is available on St Peters Ch Rd.
- Sewer is not available at this location, current development is served by on-site septic.

Transportation

- Springs Rd is a minor collector in the NCDOT maintenance system with 2025 traffic counts of 9,400 Annual Average Daily Traffic (AADT).
- St Peters Church Rd had an average daily trip count of 4,900 in 2025.
- This portion of Springs Rd, from Charlotte St to NC 16 Hwy, is recommended for widening beyond 2050 horizon year.

Land Use Plan

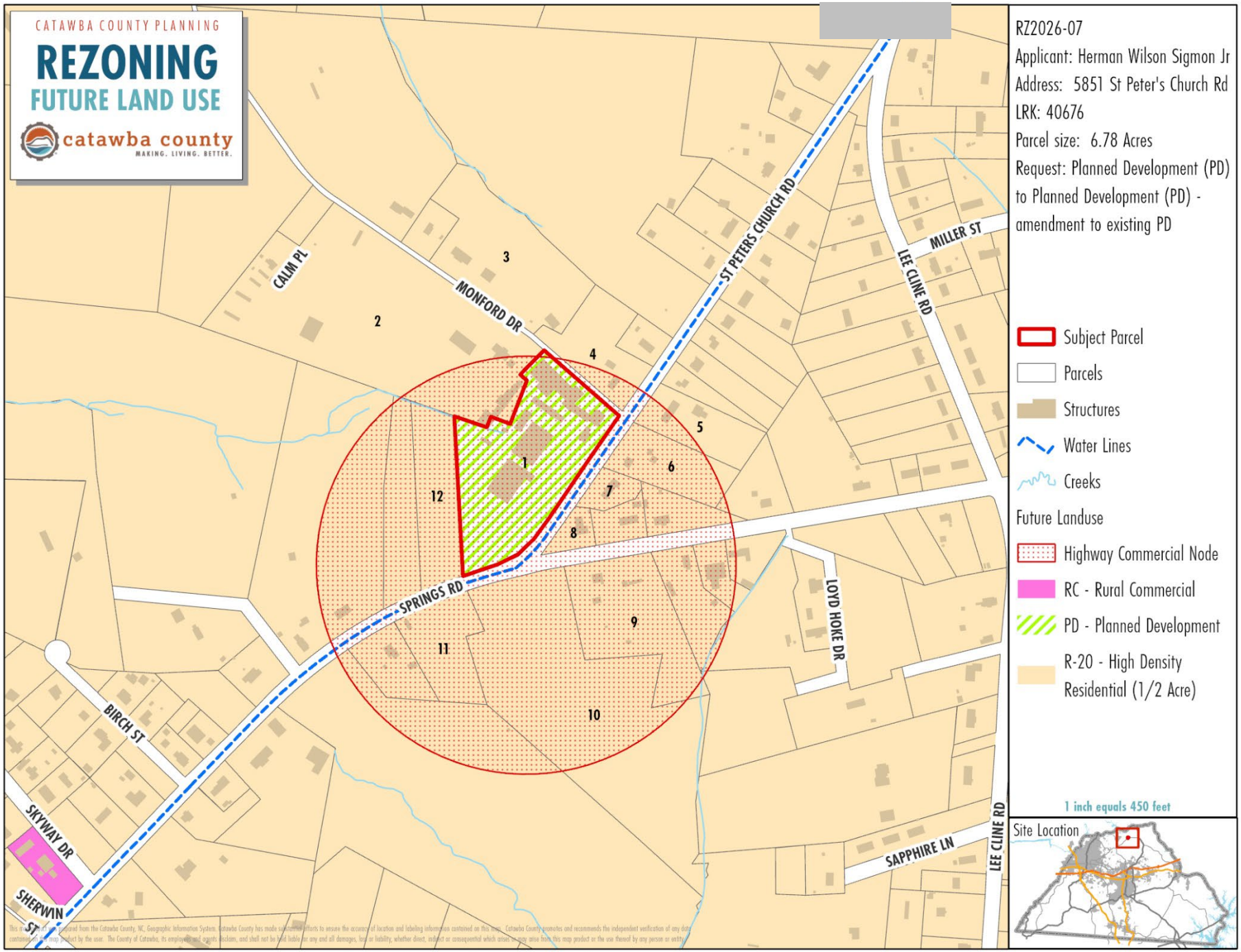
- The Catawba County Comprehensive Plan was adopted in April 2024.
- Future Land Use Map denotes Planned Development for this parcel.
- Future Land Use Map shows this parcel located in a future commercial node.

CATAWBA COUNTY PLANNING

REZONING

FUTURE LAND USE

catawba county
MAKING. LIVING. BETTER.



RZ2026-07
Applicant: Herman Wilson Sigmon Jr
Address: 5851 St Peter's Church Rd
LRK: 40676
Parcel size: 6.78 Acres
Request: Planned Development (PD) to Planned Development (PD) - amendment to existing PD

- Subject Parcel
- Parcels
- Structures
- Water Lines
- Creeks

Future Landuse

- Highway Commercial Node
- RC - Rural Commercial
- PD - Planned Development
- R-20 - High Density Residential (1/2 Acre)

1 inch equals 450 feet

Site Location

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Planning Board Public Hearing

- Public Hearing on October 26, 2026
- The applicant and one citizen spoke in support of the request.
- There was no opposition to the request.

Staff Recommendation

Staff recommends and the Planning Board voted 8-0 to: 1) adopt the proposed consistency and reasonableness statement, and 2) amend the Planned Development at 5851 St. Peters Church Rd to include the proposed Outdoor Storage Facility based on:

1) The Catawba County Comprehensive Plan Future Land Use Map's recommendation for planned development for this parcel;

2) The property being located inside a commercial node as designated by the 2024 Comprehensive Plan;

3) The existing commercial development within the previously approved Planned Development.

Label	owner	owner.address	owner.city	owner.state	owner.zip
1	SIGMON HERMAN WILSON JR	5901 MONFORD DR	CONOVER	NC	28613-8700
2	SIGMON HERMAN WILSON JR	5901 MONFORD DR	CONOVER	NC	28613-8700
3	SIGMON JAMIE LYNN	5904 MONFORD DR	CONOVER	NC	28613-8700
4	SIGMON TONY EDWIN	5873 ST PETERS CHURCH RD	CONOVER	NC	28613-8751
5	GANTT JEANNETTE C	5860 ST PETERS CHURCH RD	CONOVER	NC	28613-8751
6	SIGMON HERMAN WILSON JR	5901 MONFORD DR	CONOVER	NC	28613-8700
7	XIONG PA KOU	5826 ST PETERS CHURCH RD	CONOVER	NC	28613-8751
8	SHERRILL BILLY HERBERT HEIRS	5091 SPRINGS RD	CONOVER	NC	28613-9247
9	BOLTON DANNY JR	161 HOUSTON LOOP	TAYLORSVILLE	NC	28681-8044
10	SIGMON BRIAN WILLIAM	4932 SPRINGS RD	CONOVER	NC	28613-7402
11	SIGMON HERMAN WILSON JR	5901 MONFORD DR	CONOVER	NC	28613-8700
12	SIGMON HERMAN WILSON JR	5901 MONFORD DR	CONOVER	NC	28613-8700

Catawba County Rezoning/Ordinance Text Amendment Application

Applicant Herman Wilson Sigmon JR Phone # 828-320-1419
Applicant's Fax _____ Applicant's Email _____
Applicant's Mailing Address 5901 Monfort Dr. City, State, Zip Conover NC
Property Owner Herman Wilson Sigmon JR. Phone # _____
Property Owner's Mailing Address _____ City, State, Zip Conover NC
Parcel 911 Address 5851 St. Peters Church Rd PIN # _____
Subdivision Name and Lot # _____
Is property currently within a Voluntary Agricultural District (VAD) or an Enhanced Voluntary Agricultural District (EVAD):
Yes ____ No X
Current Zoning District PD Proposed Zoning District PD

Type of Rezoning Application:

X **General Rezoning**
- The general information listed below shall be submitted with the rezoning application.

X **Planned Development (PD)/Special District (i.e. 321-ED-MX) Rezoning**
- All information contained in the Planned Development Chart and/or Special District Chart of the Procedures Manual is to be shown on a plan submitted with the application and the general information below.

☐ **Conditional District Rezoning**
- All information contained in the Conditional District Development Chart of the Procedures Manual is to be shown on a plan submitted with the application. The complete application includes the general information below and specific development conditions substantially agreed to by the staff and applicant as well as a development agreement if applicable.

☐ **Manufactured Home Park Rezoning**
- All information contained in the Manufactured Home Park Development Chart of the Procedures Manual is to be shown on a plan submitted with the application and the general information below.
- Proposed Park Name _____

☐ **Ordinance Text Amendment**
- Submit general information listed below.

General Information to be attached:

☐ If a portion of an existing parcel is requested to be rezoned, a survey of the portion of the parcel(s) covered by the proposed amendment at a scale no smaller than 1 inch equals 200 feet, on a 18 x 24 inch map and one 8 x 11 inch map (30 copies).
☐ Submittal of 20 copies of each map including digital copies in .pdf or .jpg format.
☐ If applicable, a legal description of such land
☐ If applicable, a detailed statement of any alleged error in the Unified Development Ordinance which would be corrected by the proposed amendment, and a detailed explanation of the manner the proposed amendment will correct the alleged error.
X A detailed statement of all other circumstances, factors, and reasons, which applicant offers in support of the proposed zoning map or text amendment.
X Filing Fee: Per Catawba County Fee Schedule

Applicant's Name (Printed) Herman Wilson Sigmon JR
Applicant's Signature _____ Date 9-8-26
Property Owners Name (Printed) Herman Wilson Sigmon JR
Property Owner's Signature _____ Date 9-8-26

Innovative Construction of NC LLC
5230 Starboard Lane
Granite Falls NC 28630
828.217.1286

I am writing this letter on behalf of Wilson Sigmon in regard to the mini storage he is wanting to construct at his property located at 5851 St. Peters Church Rd Conover NC 28613. He is seeking out a rezoning amendment to fit approximately 4 mini storage buildings containing 83 storage units on what is now a pastor beside his current business (Sig's Tire and Auto). Wilson believes there is a need for storage in the community due to the increase in housing in the area with little to no storage. Thank you for your attention to this matter.

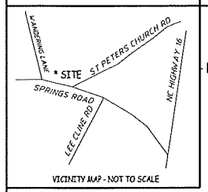
Owner/Operator
Jason Lawing
Innovative Construction of NC LLC
828.217.1286

LEGEND

EIP	Existing Iron Pin Found
NIP	New Iron Pin Set
MH	Manhole
LP	Light Pole
PP	Power Pole
	Power Line
	Water Line
	Sewer Line
	Fiber Optic Line
T	Telephone Line
UE	U/G Electric Line
	U/G Telephone Line
	Nat Gas Line
	Barbed Wire Fence
S	Sewer Manhole
D	Drainage Manhole
	Fire Hydrant
	Sprinkler Valve

DARRIN L. REID, PLS
Surveying and Planning
2729 GETTYSBURG PLACE
CLAREMONT, N.C. 28610
(828) 459-5659

" PRELIMINARY PLAT "
Not for Recordation, Conveyance, or Sales
NOT FOR CONSTRUCTION
- FOR PLANNED DEVELOPMENT AMENDEMENT ONLY -



VICINITY MAP - NOT TO SCALE

GRAPHIC SCALE
20 0 10 20 40 60
(IN FEET)
1 inch = 20 ft.

CONTRACTOR TO FIELD VERIFY ALL EXISTING UTILITIES LOCATIONS AND ELEVATIONS BEFORE BEGINNING CONSTRUCTION. ANY DISCREPANCIES FOUND SHALL BE REPORTED IMMEDIATELY

(3) DAYS BEFORE DIGGING IN NORTH CAROLINA CALL:
1.800.632.4949
NORTH CAROLINA 1 CALL CENTER

7" S.9.5B
6" CABC
TYPICAL SECTION OF LIGHT DUTY PAVEMENT
NOT TO SCALE

Zoned : R-20
" HERMAN WILSON SIGMON JR. "
3745-17-21-1384

Zoned : PD
" HERMAN WILSON SIGMON JR. "
3745-17-21-0341

Zoned : PD
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3745-17-21-0341

15,840 SQ FT.
EXISTING METAL AND
BRICK BLDG.

PROPERTY LINE
N 02°01'53" W 620.37'

Ex. Propane Tank
NOTE : NEW 6' CHAIN LINK SECURTIY FENCE
Ex. Cov. Shed
Ex. Conc. apron
Ex. Catch Basin Rim - 1089.40'
Existing Paved Parking and Drive
NOTE: MODIFICATION OF EXISTING SIGN WILL REQUIRE APPROVAL BY CATAWBA CO. PLANNING DEPARTMENT.
EXISTING SIGN LOCATION
10X70 NC DOT SIGHT TRIANGLES AT EXISTING ENTRANCE
Existing Paved Drive
260.51'
S 35°16'14" W
35'
ST PETERS CHURCH ROAD S.R. 1453
Public R/W

1089
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1091.7
1090.75
1090.5
1091.9
1091.50
1090.00
1091.75
1092.0
1090.5'
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FFE1092.0
200'x20' Proposed Mini Storage Bldg
4000 sq. ft. (ONE STORY)

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160'x30' Proposed Mini Storage Bldg
4800 sq. ft. (ONE STORY)
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FFE1093.0

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Ex. Woven Wire Fence to be replaced
Ex. Fire Vault w/ FDC Connect
Ex. Hyd.
1091
MOTORIZED GATE WITH KEYPAD CONTROL
Existing Paved Parking and Drive
5 EX. PARKING SPACES MARKED FOR MINI-STORAGE USE
1 2 3 4 5
30' Bldg. Setback
LANDSCAPE PARKING AS PER CATAWBA CO. ORD.
HELERI HOLLY BUSHES 6' O.C.
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GATE
Maintain Minumum of 3' Cover over Existing Waterline
50' Planned Development Buffer Setback
Pipe Bollard (Typ.)
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NOTE : RIP RAP DISSIPATOR BETWEEN PIPES
Ex. Hyd.
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DITCH
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S 72°34'00" W
Ex. Woven Wire Fence
30' Bldg. Setback
160 L.F. OF 15" HDP PIPE
10 L.F. OF 15" HDP PIPE
45 L.F. OF 15" HDP PIPE
R/W pt
EX F/O BOX 1096.29'
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Grass Storm Swale
16,326 sq. ft. of New Light Duty Pavement
Proposed Shurbs (Compacta Holly 6' O.C.
Existing Shrubs
SPRINGS ROAD S.R. 1453
Public R/W
Zoned : R-20
" HERMAN WILSON SIGMON JR. "
3745-18-20-6576

NOTE : LETTER OF LANDSCAPE BUFFER WAIVER BETWEEN HERMAN WILSON SIGMON JR. AS CO-OWNER OF ADJACENT PROPERTY ALONG THIS LINE WILL BE EXECUTED AND ON FILE WITH CATAWBA COUNTY PLANNING DEPARMENT. FOR THE AMENDMENT TO PLANNED DEVELOPMENT SHOWN HEREON.

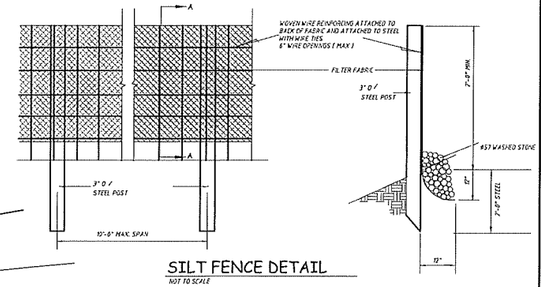
P.B. 55 PAGE 47

Stabilization Timeframes as NCDNR Erosion Dept.

SITE AREA DESCRIPTION	STABILIZATION	TIMEFRAME EXCEPTIONS
Perimeter dikes, swales, ditches, and slopes	7 DAYS	NONE
HIGH QUALITY water (HQW) zones	7 DAYS	NONE
Slopes steeper than 3 : 1	7 DAYS	If slopes are 10' or less in length and are not steeper than 2:1, 14 days are allowed
Slopes FLATTER than 3 : 1 or equal	14 DAYS	7 Days for slopes greater than 50' in length
All areas with slopes flatter than 3:1	14 DAYS	NONE, except for perimeters and HQW Zones

- ALL STORM DRAINAGE PIPE TO BE FIELD VERIFIED
- ALL SOIL CONDITIONS TO BE VERIFIED BY GEOTECHNICAL ENGINEER

FENCE FABRIC SHALL BE A MINIMUM OF 36" IN WIDTH AND SHALL HAVE A MINIMUM OF 6 LINE WIRES WITH 12" STAY SPACING
FILTER FABRIC SHALL BE MIRAFI 140 FABRIC OR EQUIVALENT.
STEEL POSTS SHALL BE 5'-0" IN HEIGHT AND BE OF THE SELF-FASTENER ANGLE STEEL TYPE
IN ACCORDANCE WITH SECTION 6.62 OF EROSION CONTROL MANUAL



SILT FENCE DETAIL
NOT TO SCALE

SITE SETBACKS FOR BUILDING :
30' BUILDING SETBACK FROM R/W LINE
50' PLANNED DEVELOPMENT SETBACK FROM PROPERTY LINE
ALLOWED BUILDING HEIGHT -35'
(SAME AS EXISTING R-26 ZONING REQUIREMENT)

SITE NOTES : CURRENT ZONING CLASSIFICATION : PD
AS SHOWN AND RECORDED IN PLAT BOOK 55 PAGE 47

WATERSHED CLASSIFICATION : NONE
100 YEAR FLOOD CLASSIFICATION : NONE
(FEMA FIRM PANEL 3710374400J) 9-5-2007)
TOTAL NUMBER OF PROPOSED MINI-STORAGE UNITS - 83
NUMBER OF PARKING REQUIRED , 1 PER 20 UNITS = 5

EXISTING ZONED : PD

" PRELIMINARY PLAT "
Not for Recordation, Conveyance, or Sales
NOT FOR CONSTRUCTION -
- FOR PLANNED DEVELOPMENT AMENDEMENT ONLY -

ADDITIONAL SITE IMPERVIOUS AREA = 0.74 ACRES

Proposed EXISTING PLANNED DEVELOPMENT AMENDED Site Plan For :
" HERMAN WILSON SIGMON JR. "
PROPERTY ADDRESS : 5851 ST. PETERS CHURCH ROAD - CONOVER, N.C. 28613
NC PIN # 3745-18-21-5364 DEED BOOK 2028 PAGE 1462
BEING AN AMENDMENT OF PLAT BOOK 55 PAGE 47
CLINES TOWNSHIP CATAWBA COUNTY, N.C. 28613
SCALE : 1" = 20' DRAWN BY : D.L.R.
DATE : AUGUST 25 ,2026 FIELD FILE :
Revised : SEPT 10 , 2026 as per County Planning Staff Comments

Ordinance No. 2026-_____

AMENDMENT TO THE CATAWBA COUNTY ZONING MAP

BE IT ORDAINED, BY THE BOARD OF COMMISSIONERS, that the Catawba County Official Zoning Atlas is hereby amended by revising the concept plan of the Planned Development (PD) of the property described below:

A 6.78-acre parcel, located at 5851 Saint Peters Church Road, further identified by Parcel Identification Number 3745-18-21-5364.

This, the 16th day of November 2026.

_____
C. Randall Isenhower, Chair

catawba county
planning

CATAWBA COUNTY BOARD OF COMMISSIONERS

PROPOSED PLAN CONSISTENCY AND REASONABLENESS STATEMENT

Zoning Amendment Request: To rezone a 6.78-acre parcel located 5851 St Peters Church Road, identified with parcel number 3745-18-21-5364, from the existing current Planned Development (PD) to an amended PD to include an outdoor self-storage facility.

The Catawba County Board of Commissioners finds the request consistent with the Catawba County Comprehensive Plan's Future Land Use Map recommendation of planned development on this parcel and the parcel is located within a Highway Commercial node as designated by the 2024 Comprehensive Plan St. Stephens/Oxford Future Land Use Map.

Pursuant to NCGS 160D-605, the Board of Commissioners finds the rezoning request reasonable and in the public's interest based upon:

1. The Future Land Use map within the Comprehensive Plan's recommendation for planned development on this parcel;
2. This parcel's location within a Highway Commercial node as designated by the 2024 Comprehensive Plan St. Stephens/Oxford Future Land Use Map; and
3. The existing commercial development within Planned Development.

By a vote of _____, the Catawba County Board of Commissioners approves the rezoning request.

This the 16th day of November, 2026.

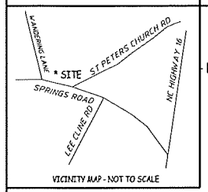
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C. Randall Isenhower, Chair

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DARRIN L. REID, PLS
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R/W pt
EX F/O BOX 1096.29'
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3745-18-20-6576

NOTE : LETTER OF LANDSCAPE BUFFER WAIVER BETWEEN HERMAN WILSON SIGMON JR. AS CO-OWNER OF ADJACENT PROPERTY ALONG THIS LINE WILL BE EXECUTED AND ON FILE WITH CATAWBA COUNTY PLANNING DEPARMENT. FOR THE AMENDMENT TO PLANNED DEVELOPMENT SHOWN HEREON.

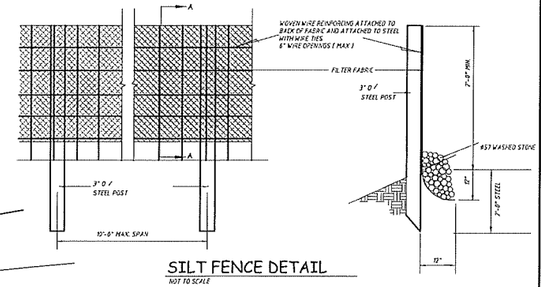
P.B. 55 PAGE 47

Stabilization Timeframes as NCDNR Erosion Dept.

SITE AREA DESCRIPTION	STABILIZATION	TIMEFRAME EXCEPTIONS
Perimeter dikes, swales, ditches, and slopes	7 DAYS	NONE
HIGH QUALITY water (HQW) zones	7 DAYS	NONE
Slopes steeper than 3 : 1	7 DAYS	If slopes are 10' or less in length and are not steeper than 2:1, 14 days are allowed
Slopes FLATTER than 3 : 1 or equal	14 DAYS	7 Days for slopes greater than 50' in length
All areas with slopes flatter than 3:1	14 DAYS	NONE, except for perimeters and HQW Zones

- ALL STORM DRAINAGE PIPE TO BE FIELD VERIFIED
- ALL SOIL CONDITIONS TO BE VERIFIED BY GEOTECHNICAL ENGINEER

FENCE FABRIC SHALL BE A MINIMUM OF 36" IN WIDTH AND SHALL HAVE A MINIMUM OF 6 LINE WIRES WITH 12" STAY SPACING
FILTER FABRIC SHALL BE MIRAFI 140 FABRIC OR EQUIVALENT.
STEEL POSTS SHALL BE 5'-0" IN HEIGHT AND BE OF THE SELF-FASTENER ANGLE STEEL TYPE
IN ACCORDANCE WITH SECTION 6.62 OF EROSION CONTROL MANUAL



SILT FENCE DETAIL
NOT TO SCALE

SITE SETBACKS FOR BUILDING :
30' BUILDING SETBACK FROM R/W LINE
50' PLANNED DEVELOPMENT SETBACK FROM PROPERTY LINE
ALLOWED BUILDING HEIGHT -35'
(SAME AS EXISTING R-26 ZONING REQUIREMENT)

SITE NOTES : CURRENT ZONING CLASSIFICATION : PD
AS SHOWN AND RECORDED IN PLAT BOOK 55 PAGE 47

WATERSHED CLASSIFICATION : NONE
100 YEAR FLOOD CLASSIFICATION : NONE
(FEMA FIRM PANEL 3710374400J) 9-5-2007)
TOTAL NUMBER OF PROPOSED MINI-STORAGE UNITS - 83
NUMBER OF PARKING REQUIRED , 1 PER 20 UNITS = 5

EXISTING ZONED : PD

" PRELIMINARY PLAT "
Not for Recordation, Conveyance, or Sales
NOT FOR CONSTRUCTION -
- FOR PLANNED DEVELOPMENT AMENDEMENT ONLY -

ADDITIONAL SITE IMPERVIOUS AREA = 0.74 ACRES

Proposed EXISTING PLANNED DEVELOPMENT AMENDED Site Plan For :
" HERMAN WILSON SIGMON JR. "
PROPERTY ADDRESS : 5851 ST. PETERS CHURCH ROAD - CONOVER, N.C. 28613
NC PIN # 3745-18-21-5364 DEED BOOK 2028 PAGE 1462
BEING AN AMENDMENT OF PLAT BOOK 55 PAGE 47
CLINES TOWNSHIP CATAWBA COUNTY, N.C. 28613
SCALE : 1" = 20' DRAWN BY : D.L.R.
DATE : AUGUST 25 ,2026 FIELD FILE :
Revised : SEPT 10 , 2026 as per County Planning Staff Comments

MEMORANDUM

TO: Board of Commissioners

FROM: Mary Morrison, Chief Financial Officer

DATE: November 16, 2026

SUBJECT: Debt Issuance – Resolution of Preliminary Findings

REQUEST

Staff requests the Board of Commissioners consider a.) adopting a proposed Resolution authorizing negotiation of up to $153,000,000 in installment financing, application for Local Government Commission approval of this transaction, acquisition of appropriate collateral property, and setting a public hearing for December 21, 2026, and b.) approving appropriation of $1,000,000 in funds to address anticipated installment financing costs and a transfer appropriation that establishes individual capital projects for each middle school and aligns previous appropriations in the correct projects.

BACKGROUND

Catawba County's current debt obligations total 4% of its authorized legal borrowing capacity of $2.5 billion. Planned, structured responsible debt is an important component of Catawba County's overarching financial management strategy. Catawba County is initiating the process to secure up to $153 million in debt to fund the following priority projects, consistent with Board direction derived through past policy commitments, the FY2026-27 Budget process, and recent discussions of emergent facility need:

- *Catawba County Schools Middle School Expansion -- $110,000,000.* This project will fund capital renovation and classroom expansion costs at H.M. Arndt, Jacobs Fork, Maiden, Mill Creek and River Bend Middle Schools. These expansions and improvements are necessary to accommodate the realignment of 6th grade from Catawba County Schools' elementary to middle school grade configuration.
- *Newton Conover City Schools Newton Conover High School (NCHS) - $16,000,000.* This project will reimburse the County for $4,000,000 in expenses previously incurred during Phase I of the NCHS project, and will support the remaining $12,000,000 in expenses associated with Phase 2, including construction of a new band and restroom building and renovation of the math wing and the JROTC building, new elevators, exterior canopies, landscaping, etc.
- *Landfill Subtitle D Cell Construction - $11,127,000.* This project, estimated at $16,127,000 in total, with $5,000,000 in cash put towards the project, funds the continuum of Subtitle D Cell construction costs. The targeted project timeline for Unit 4 Cell D aims to have construction completed and the cell ready to receive waste by June 2028.
- *Catawba Valley Community College Cuylar Dunbar (CAD) Building - $7,000,000.* This project consists of a full brick recladding, or installation of a brick overcoat, of the CAD Building exterior. The need for this critical building repair project was recently identified during a smaller repair project, where the extent of the surface area needing repair was found to be much larger than initially understood.
- *Limited Obligation Bonds Series 2014A Refinancing - $5,000,000.* This project evaluates potential savings associated with refinancing the remaining existing debt associated with the County's 2014 financing of the Justice / Public Safety Center in an effort to secure more favorable financing terms for the remainder of the outstanding debt.
- *Installment Financing Costs - $1,000,000.* The costs associated with retaining professional services (municipal financial advisors, bond counsel, trustees, underwriters, etc.) are included in the total financing amount.

If the Board approves the resolution presented for its consideration today, a public hearing will be advertised for December 21, 2026, and staff will take the steps necessary to prepare a debt application to the Local Government Commission on behalf of Catawba County. Staff anticipates submitting the application for Local Government Commission consideration in early 2027.

If approved by the LGC, the first debt payment associated with this transaction would be due in October 2027.

RECOMMENDATION

Staff recommends the Board of Commissioners consider a.) adopting a proposed Resolution authorizing negotiation of up to $153,000,000 in installment financing, application for Local Government Commission approval of this transaction, acquisition of appropriate collateral property, and setting a public hearing for December 21,

2026, and b.) approving appropriation of $1,000,000 in funds to address anticipated installment financing costs and a transfer appropriation that establishes individual capital projects for each middle school and aligns previous appropriations in the correct projects.

Transfer Appropriation for Pre-Construction

From:		
423-740100-863200-31100-3-01	CCS Middle Schools Renov (Design Only)	(7,020,000)
To:		
423-740100-863200-31101-3-04	Arndt MS Renovations-6th Grade	1,755,000
423-740100-863200-31112-3-05	Jacobs Fork Renovations-6th Grade	1,755,000
423-740100-863200-31115-3-03	Mill Creek Renovations-6th Grade	1,755,000
423-740100-863200-31118-3-01	Riverbend Renovations-6th Grade	1,755,000

Supplement Appropriation

Revenue		
110-190050-690100	Fund Balance Appropriation	897,262
525-350200-690100	Fund Balance Appropriation	102,738
Expense		
110-930500-856910	Installment Financing Costs	897,262
525-350200-856910	Installment Financing Costs	102,738

RESOLUTION OF THE BOARD OF COMMISSIONERS OF CATAWBA COUNTY, NORTH CAROLINA, AUTHORIZING THE NEGOTIATION OF AN INSTALLMENT FINANCING CONTRACT, DIRECTING THE PUBLICATION OF NOTICE WITH RESPECT THERETO AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS THERETO

WHEREAS, Catawba County, North Carolina (the "*County*") is a validly existing political subdivision of the State of North Carolina (the "*State*"), existing as such under and by virtue of the Constitution, statutes and laws of the State;

WHEREAS, the County has the power, pursuant to the General Statutes of North Carolina to (1) enter into installment contracts in order to purchase, or finance or refinance the purchase of, real or personal property and to finance or refinance the construction or repair of fixtures or improvements on real property and (2) create a security interest in some or all of the property financed or refinanced to secure repayment of the purchase price;

WHEREAS, the County previously entered into an Installment Financing Agreement, dated as of May 1, 2005, as amended by that certain Amendment Number One to the Installment Financing Agreement dated as of December 1, 2012, as amended by that certain Amendment Number Two to the Installment Financing Agreement dated as of February 1, 2014 (collectively, the "*2014A Contract*"), in each case with the Catawba County Public Facilities Financing Corporation (the "*Corporation*"), the proceeds of which were used to (1) finance the costs of constructing and equipping an expansion of an addition to the County's Justice Center and (2) prepay the costs of refinancing of a portion of the County's installment payment obligations related to the Certificates of Participation (Catawba County Public School and Community College Facilities Project), Series 2004 (collectively, the "*Refunded Projects*");

WHEREAS, the Board of Commissioners of the County (the "*Board of Commissioners*") hereby determines that it is in the best interest of the County to (1) pay all or a portion of the capital costs of (a) renovations and improvements to H.M. Arndt Middle School, Jacobs Fork Middle School, Maiden Middle School, Mill Creek Middle School and River Bend Middle School (the "*Middle School Projects*"), (b) renovations and improvements to Newton-Conover High School (the "*High School Project*"), (c) renovations and improvements to the Cuyler A. Dunbar Building of Catawba Valley Community College (the "*Community College Project*") and (d) the design and construction of a cell at the Blackburn Resource Recovery Facility (the "*Landfill Project*" and, together with the Middle School Projects, the High School Project and the Community College Project, the "*2027 Projects*"; and the 2027 Projects, together with the Refunded Projects, the "*Projects*"), (2) prepay the costs of refinancing all or a portion of the County's installment payment obligations related to the Limited Obligation Bonds (Catawba County, North Carolina), Series 2014A (the "*2014A Bonds*"), which financed and refinanced the Refunded Projects, and (3) pay costs related to the execution and delivery of the Contract (as defined below);

WHEREAS, the Corporation will assist the County by the issuance of its Limited Obligation Bonds (Catawba County, North Carolina), Series 2027 (the "*Bonds*") to finance the 2027 Projects and refinance the Refunded Projects;

WHEREAS, as part of its plan to finance the 2027 Projects and refinance the Refunded Projects, the Board of Commissioners hereby determines that it is in the best interest of the County to finance the 2027 Projects and refinance the Refunded Projects, together with other funds available to the County, by (1) entering into an Installment Financing Contract (the "*Contract*") with the Corporation in order to finance the capital costs of the 2027 Projects, the prepayment of all or a portion of the County's installment payment obligations related to the 2014A Bonds under the 2014A Contract and pay the costs related to the execution and delivery of the Contract, and (2) entering into a deed of trust, security agreement and fixture filing (the "*Deed of Trust*") related to the County's fee simple interest in certain real property on which all or a portion

of the 2027 Projects are and will be located (the "*Mortgaged Property*"), that will provide security for the County's obligations under the Contract;

WHEREAS, to facilitate the plan of finance and for the purposes of providing security for the Bonds under the Deed of Trust, the County currently expects that the site of the High School Project will be acquired by the County from the Newton-Conover City Schools Board of Education pursuant to Section 153A-158.1 of the General Statutes of North Carolina and then leased to the Newton-Conover City Schools Board of Education to be used for public school purposes, which lease will be subordinate to the lien of the Deed of Trust; provided, however, that if additional security is needed, the County also may acquire the site or sites of one or more of the Middle School Projects from the Catawba County Board of Education;

WHEREAS, the Contract and the Deed of Trust are expected to permit the County to enter into amendments to finance additional projects using the Mortgaged Property as collateral, and the County may or may not grant additional collateral in connection with such amendments;

WHEREAS, the County hereby determines that financing the 2027 Projects and refinancing the Refunded Projects are essential to the County's proper, efficient and economic operation and to the general health and welfare of its inhabitants; that financing the 2027 Projects and refinancing the Refunded Projects will provide an essential use and will permit the County to carry out public functions that it is authorized by law to perform; and entering into the Contract and Deed of Trust is necessary and expedient for the County by virtue of the findings presented herein;

WHEREAS, the County hereby determines that the Contract allows the County to finance the 2027 Projects and take title thereto and to refinance the Refunded Projects, in each case at a favorable interest rate currently available in the financial marketplace and on terms advantageous to the County;

WHEREAS, the County hereby determines that the estimated cost of financing the 2027 Projects and refinancing the Refunded Projects is an amount not to exceed $153,000,000, and that such cost exceeds the amount that can be prudently raised from currently available appropriations, unappropriated fund balances and non-voted bonds that could be issued by the County in the current fiscal year pursuant to Article V, Section 4 of the Constitution of the State;

WHEREAS, although the cost of financing and refinancing the Projects pursuant to the Contract is expected to exceed the cost of financing and refinancing the Projects pursuant to a bond financing for the same undertaking, the County hereby determines that the cost of financing and refinancing the Projects pursuant to the Contract and the Deed of Trust and the obligations of the County thereunder are preferable to a general obligation bond financing or revenue bond financing for several reasons, including but not limited to the following: (1) the cost of a special election necessary to approve a general obligation bond financing, as required by the laws of the State, would result in the expenditure of significant funds; (2) the time required for a general obligation bond election would cause an unnecessary delay which would thereby decrease the benefits of the 2027 Projects; and (3) no revenues are produced by the Middle School Projects, High School Project, Community College Project or the Refunded Projects so as to permit a revenue bond financing, nor are the revenues produced by the Landfill Project sufficient to permit a revenue bond financing;

WHEREAS, the County hereby determines that the estimated cost of financing the 2027 Projects and refinancing the Refunded Projects pursuant to the Contract reasonably compares with an estimate of similar costs under a bond financing for the same undertaking as a result of the findings delineated in the above preambles;

WHEREAS, the County anticipates that any property tax increase, if necessary, to pay installment payments falling due under the Contract will not be excessive;

WHEREAS, no deficiency judgment may be rendered against the County in any action for its breach of the Contract, and the taxing power of the County is not and may not be pledged in any way directly or indirectly or contingently to secure any money due under the Contract;

WHEREAS, the County is not in default under any of its debt service obligations;

WHEREAS, the County's budget process and annual budget ordinance are in compliance with the Local Government Budget and Fiscal Control Act, and external auditors have determined that the County has conformed with generally accepted accounting principles as applied to governmental units;

WHEREAS, past audit reports of the County indicate that its debt management and contract obligation payment policies have been carried out in strict compliance with the law, and the County has not been censured by the North Carolina Local Government Commission (the "*LGC*"), external auditors or any other regulatory agencies in connection with such debt management and contract obligation payment policies;

WHEREAS, a public hearing on the Contract and the proposed acquisition of the sites of the High School Project and the Middle School Projects after publication of a notice with respect to such public hearing must be held and approval of the LGC with respect to entering the Contract must be received; and

WHEREAS, the County hereby determines that all findings, conclusions and determinations of the County in this Resolution are subject to modification or affirmation after all interested parties have been afforded the opportunity to present their comments at a public hearing regarding the execution and delivery of the Contract and the Deed of Trust and the 2027 Projects to be financed.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF CATAWBA COUNTY, NORTH CAROLINA, AS FOLLOWS:

Section 1. Authorization to Negotiate the Contract and Acquisition of the Sites of the High School Project and Middle School Projects. The County Manager and the Chief Financial Officer, or any individual serving in an interim capacity, individually or collectively, with advice from the County Attorney, are hereby authorized and directed to proceed and negotiate on behalf of the County for the financing of the 2027 Projects, the refinancing of the Refunded Projects and the costs related to the execution and delivery of the Contract for a principal amount not to exceed $153,000,000 under the Contract to be entered into in accordance with the provisions of Section 160A-20 of the General Statutes of North Carolina and to provide in connection with the Contract, as security for the County's obligations thereunder, a Deed of Trust conveying a lien and interest in the Mortgaged Property, including the improvements thereon, as may be required by the entity, or its assigns, providing the funds to the County under the Contract. The County Manager and the Chief Financial Officer, individually or collectively, with advice from the County Attorney, are also authorized and directed to negotiate, on behalf of the County, the acquisition of the sites of the High School Project or the Middle School Projects from, respectively, the Newton-Conover City Schools Board of Education or the Catawba County Board of Education, and the lease of such sites to, respectively, the Newton-Conover City Schools Board of Education or the Catawba County Board of Education, in each case to be used for public school purposes.

The Chief Financial Officer, and her respective designees, are each hereby directed to evaluate the merits and potential benefits to the County of refunding its installment payment obligations related to the 2014A Bonds and are hereby authorized to pursue the refunding of all or any portion of the 2014A Bonds

if the County can achieve sufficient net present value savings from the refunding of the 2014A Bonds as determined by the Chief Financial Officer, and her respective designees.

Section 2. Application to LGC. The Chief Financial Officer, or her designee, is directed to file with the LGC an application for its approval of the Contract and all relevant transactions contemplated thereby on a form prescribed by the LGC and to state in such application such facts and to attach thereto such exhibits regarding the County and its financial condition as may be required by the LGC. The Board of Commissioners hereby makes the findings and determinations set forth in the recitals to this Resolution, which are hereby incorporated by reference.

Section 3. Direction to Retain Professionals. The Chief Financial Officer is hereby authorized and directed to retain the assistance of Parker Poe Adams & Bernstein LLP, as bond counsel; First Tryon Advisors, as municipal advisor; U.S. Bank Trust Company, National Association, as trustee, and Robert W. Baird & Co. Incorporated, as managing underwriter, with PNC Capital Markets LLC and Hilltop Securities Inc., as co-managing underwriters. The Chief Financial Officer is hereby authorized to retain such other professionals as she deems necessary in her judgment to carry out the transaction contemplated in this Resolution.

Section 4. Public Hearing. A public hearing (the "*Public Hearing*") shall be conducted by the Board of Commissioners on December 21, 2026 at 7:00 p.m. (or as soon thereafter as the public hearing may be held) in the Board of Commissioners Meeting Room, 2nd Floor of the Catawba County Justice Center, located at 100 Government Drive, Newton, North Carolina 28658, concerning the Contract and the proposed acquisition of the site of the High School Project and the Middle School Projects. The Clerk to the Board is hereby directed to cause a notice of the Public Hearing to be published once in a qualified newspaper of general circulation within the County no fewer than ten days prior to the Public Hearing.

Section 5. Repealer. All motions, orders, resolutions and parts thereof in conflict herewith are repealed.

Section 6. Effective Date. This Resolution is effective on the date of its adoption.

STATE OF NORTH CAROLINA)
) SS:
COUNTY OF CATAWBA)

I, DALE STILES, Clerk to the Board of Commissioners of Catawba County, North Carolina, ***DO HEREBY CERTIFY*** that the foregoing is a true and exact copy of a resolution entitled **"RESOLUTION OF THE BOARD OF COMMISSIONERS OF CATAWBA COUNTY, NORTH CAROLINA, AUTHORIZING THE NEGOTIATION OF AN INSTALLMENT FINANCING CONTRACT, DIRECTING THE PUBLICATION OF NOTICE WITH RESPECT THERETO AND PROVIDING FOR CERTAIN OTHER RELATED MATTERS THERETO"** duly adopted by the Board of Commissioners of Catawba County, North Carolina at a meeting held on the 16th day of November, 2026.

WITNESS my hand and the corporate seal of Catawba County, North Carolina, this the _____ day of November, 2026.

(SEAL)

_____
Dale Stiles
Clerk to the Board of Commissioners
Catawba County, North Carolina

NOTICE OF PUBLIC HEARING

At its November 16, 2026 meeting, the Board of Commissioners (the "*Board*") of Catawba County, North Carolina (the "*County*") adopted a resolution which:

1. Authorized the County to proceed to (a) pay all or a portion of the capital costs of (i) renovations and improvements to H.M. Arndt Middle School, Jacobs Fork Middle School, Maiden Middle School, Mill Creek Middle School and River Bend Middle School (the "*Middle School Projects*"), (ii) renovations and improvements to Newton-Conover High School (the "*High School Project*"), (iii) renovations and improvements to the Cuyler A. Dunbar Building of Catawba Valley Community College (the "*Community College Project*"), (iii) design and construction of a cell at the Blackburn Resource Recovery Facility (the "*Landfill Project*" and, together with the Middle School Projects, the High School Project and the Community College Project, the "*2027 Projects*"), (b) prepay the costs of refinancing all or a portion of the County's installment payment obligations related to the Limited Obligation Bonds (County of Catawba, North Carolina), Series 2014A, which (i) financed the costs of constructing and equipping an expansion of an addition to the County's Justice Center and (ii) prepaid the costs of refinancing of a portion of the County's installment payment obligations related to the Certificates of Participation (Catawba County Public School and Community College Facilities Project), Series 2004 (collectively, the "*Refunded Projects*"), and (c) pay costs related to the execution and delivery of an installment financing contract (the "*Contract*") in an aggregate principal amount not to exceed $153,000,000, under which the County will make certain installment payments;

2. Authorized the County to provide, in connection with the Contract, as grantor, a deed of trust and security agreement (the "*Deed of Trust*") under which all or a portion of the County's interest in the real property on which the 2027 Projects are and will be located (collectively, the "*Mortgaged Property*"), will be mortgaged by the County to create a lien thereon for the benefit of the entity, or its assigns, providing the funds to the County under the Contract. The Middle School Projects are and will be located at (a) 3350 34th Street Drive NE, Hickory, North Carolina 28601, (b) 3431 Plateau Road, Newton, North Carolina 28658, (c) 518 North C Avenue, Maiden, North Carolina 28650, (d) 1041 Shiloh Road, Claremont, North Carolina 28610 and (e) 4670 Oxford School Road, Claremont, North Carolina 28610. The Landfill Project is and will be located at 4017 Rocky Ford Road, Newton, North Carolina 28657. The High School Project is and will be located at 338 W. 15th Street, Newton, North Carolina 28658. The Community College Project is and will be located at 2550 U.S. Highway 70 SE, Hickory, North Carolina 28602.

In connection with the proposed plan of finance, the sites of the High School Project and the Middle School Projects may be acquired by the County from, respectively, the Newton-Conover City Schools Board of Education or the Catawba County Board of Education, and then leased back to, respectively, the Newton-Conover City Schools Board of Education or the Catawba County Board of Education, in each case to be used for public school purposes, which leases would be subordinate to the lien created by the Deed of Trust.

The Mortgaged Property identified above will be mortgaged under the Deed of Trust. The Contract and the Deed of Trust permit the County to enter into amendments to finance additional projects using the Mortgaged Property as collateral and the County may or may not grant additional collateral in connection with such amendments. On payment by the County of all installment payments due under the

Contract, including any future amendments to finance or refinance projects, the Deed of Trust and any lien created thereunder will terminate and the County's title to the Mortgaged Property will be unencumbered.

NOTICE IS HEREBY GIVEN, pursuant to Sections 160A-20 and 153A-158.1 of the General Statutes of North Carolina, that on December 21, 2026 at 7:00 p.m. (or as soon thereafter as the matter may be heard) the County will conduct a public hearing in the Board of Commissioners Meeting Room, on the 2nd Floor of the Catawba County Justice Center located at 100 Government Drive in Newton, North Carolina 28658, concerning the approval of the execution and delivery of the Contract and the Deed of Trust, the County's financing of the 2027 Projects and refinancing of the Refunded Projects, and the proposed acquisition of the sites of the High School Project and the Middle School Projects. All interested parties are invited to present comments at the public hearing.

Dale Stiles
Clerk to the Board of Commissioners
Catawba County, North Carolina

catawba county
north carolina

To: Board of Commissioners
From: Mary Furtado, County Manager
Date: November 16, 2026
Re: City of Hickory Water and Sewer Infrastructure Agreements

Request
Staff requests the Board of Commissioners adopt a proposed Resolution a) codifying the key terms and conditions of water and sewer infrastructure agreements between Catawba County and the City of Hickory for asset transfer, future water capacity reservation and bulk water purchase, sewer capacity allocation, and water and sewer system operations and maintenance, and b) authorizing the County Manager to finalize these transactions through a series of agreements reflecting the material terms captured in the proposed Resolution.

Background
Since the late 1990s, Catawba County and the City of Hickory have partnered to offer water and sewer service to unincorporated areas of the County, providing important infrastructure to support orderly growth and development involving schools, industries, and residential neighborhoods throughout Catawba County.

To this point, the model facilitating utility system growth has entailed the county funding infrastructure installation and Hickory maintaining and operating the lines and providing customer service and billing for the system. Each entity funded its portion of costs through a combination of user fees and contractual revenue sharing from water and sewer customer user fees collected throughout the system. In 2003, this partnership grew to entail sewer service, as Catawba County and the City of Hickory developed a partnership involving the Hickory-Catawba Wastewater Treatment Plant to serve southeastern Catawba county and the Town of Catawba. Since that time, through this partnership, the City and the County have shared equally in the cost of plant design, permitting, construction, and operations, with each controlling 750,000 gallons of the 1.5MGD expanded plant. (In addition to agreements with the Town of Catawba, Hickory has a capacity arrangement with the City of Claremont that will ultimately be transferred from Hickory to Catawba County.)

Analysis
As population and business has grown County-wide, and as Hickory plans for major upgrades to its water plant and distribution system, both jurisdictions recognize the legacy agreements governing the utility systems in southeastern Catawba County no longer meet the needs of both jurisdiction and their citizens. In 2025, Hickory, County and EDC staff began analyzing ways to optimally meet the current and future water and wastewater needs of citizens and industries. This analysis has been extensive and has included engineering studies, updated financial modeling, revisiting growth projections, and analysis of existing commitments and obligations on behalf of both jurisdictions.

A. System Ownership and Governance
This process has resulted in a joint recommendation to re-organize the mutually developed water and wastewater system, positioning the County with full ownership of the Hickory-Catawba Wastewater Treatment plant, all connected

wastewater lines, pumpstations and related appurtenances and the existing water distribution infrastructure, including lines, towers, meters, valves and related appurtenances, within the Town of Catawba and Southeastern Catawba County systems.

The City of Hickory will take ownership of six waterline segments built by the county and serving areas west of Highway 321. These line segments are commonly referred to as Blackburn, Banoak, Jamestown subdivision, Mt Grove CDBG, Advent Crossroads, and Blackburn-Plateau.

B. Financial Considerations

Upon completion of this proposed transaction, the County will retain all revenues and user fees generated within the Southeastern Catawba County water and wastewater systems, and will have full rate-setting authority moving forward.

The City of Hickory has agreed to pay the County $250,000 per year for 5 years ($1.25M) for the water line segments listed above. Both the City and the County will retire their remaining share of debt associated with the wastewater treatment plant and any assets to be transferred to the other party.

The City of Hickory will transfer $1.86M received from the City of Claremont for future wastewater plant capacity reservation to Catawba County.

C. Utility System Maintenance and Growth

Through this arrangement, it is proposed that the County will contract with the City of Hickory for billing and customer service and all operating and maintenance services required to operate the Southeastern Catawba County Water and Sewer system through an initial five-year agreement, with costs based on actual expenses related to the number of meters served, projected to be approximately $3.1M in Fiscal Year 2027-28.
The County will control and fund all system expansion and upgrade and will retain all system development fees paid by residential and industrial developers who connect to the system.

D. Securing Guaranteed Water Allocation

Catawba County currently has a 5MGD water allocation secured at $1.50 per gallon through contract with Hickory, with current development demand consuming 450,000 gallons of water per day. The County has initiated utilization of 1.7MGD of its 5MGD allocation. Through this recommended agreement, Catawba County would retain a total of 3.5MGD in future water allocation, releasing 1.5MGD back to Hickory.

- The County will have the ability to purchase an additional 300,000 gallons per day (for a total of 2MGD) within the existing pricing structure, for $1.50 per gallon, by December 31, 2031.
- To accommodate future water needs beyond 2MGD, the County will retain the right to purchase an additional 1.5MGD in a new or expanded water plant. The purchase price for the additional 1.5MGD will be the City's bulk water purchase rate for 1.5MGD, minus a $2.25M credit that acknowledges and compensates the County for its release of significant future water capacity at a deeply discounted rate.

catawba county
north carolina

To accomplish these various policy objectives, staff is working through a series of agreements between Catawba County and the City of Hickory that will collectively accomplish and effectuate this transaction:

- Asset Transfer Agreement
- Future Water and Wastewater Capacity and Bulk Water Purchase Agreement
- Southeastern Catawba County Operations and Maintenance Agreement

Staff is requesting Board of Commissioners' authorization for the County Manager to work with the City Manager to finalize and execute agreements between the jurisdictions that accomplish these policy objectives in a manner consistent with the key terms and conditions detailed in the proposed Resolution. Any material deviation from these terms would not be permitted and would require authorization by the Board of Commissioners.

Recommendation:
Staff recommends the Board of Commissioners adopt a proposed Resolution a) codifying the key terms and conditions of water and sewer infrastructure agreements between Catawba County and the City of Hickory for asset transfer, future water capacity reservation and bulk water purchase, sewer capacity allocation, and water and sewer system operations and maintenance, and b) authorizing the County Manager to finalize these transactions through a series of agreements reflecting the material terms captured in the proposed Resolution.

Resolution No. 2026-_____

RESOLUTION CODIFYING THE KEY TERMS AND CONDITIONS OF WATER AND SEWER INFRASTRUCTURE ASSET TRANSFER, FUTURE WATER CAPACITY RESERVATION, AND OPERATIONS AGREEMENTS BETWEEN CATAWBA COUNTY AND THE CITY OF HICKORY

WHEREAS, the City of Hickory (the "City") and Catawba County (the "County") have entered into multiple agreements for operation, maintenance and management of the County's water distribution system ("Water System"), sanitary sewer collection system ("Sewer System") (hereinafter collectively referred to as "Systems"), water treatment plant (hereinafter "Treatment Plant"), Henry-Fork Wastewater Treatment Plant (hereinafter "H-F Wastewater Treatment Plant") and Hickory-Catawba Wastewater Treatment Plant (hereinafter "H-C Wastewater Treatment Plant");

WHEREAS, City and County are embarking on generational utility investments requiring divestment, right-sizing and expanding partnerships as appropriate;

WHEREAS, City and County have recognized the need to enter into agreements to provide for the exchange of assets; operation, maintenance, management and improvement of the Systems; sale of treated water by the City to the County; and the availability of capacity in the Treatment Plant, H-F Wastewater Treatment Plant, and H-C Wastewater Treatment Plant (the "Transaction");

WHEREAS, the transactions contemplated by this Resolution are authorized under N.C. Gen. Stat. § 160A-274, which permits governmental units to sell, purchase, and exchange interests in real or personal property with other governmental units, and under N.C. Gen. Stat. § 160A-461, which authorizes units of local government to enter into interlocal contracts and agreements to execute any undertaking, subject to ratification by resolution of the governing board of each unit;

WHEREAS, the transactions are anticipated to be documented through an asset transfer agreement, a bulk water capacity purchase agreement, and an operations and maintenance agreement, together with such exhibits, schedules, certificates, assignments, instruments, and ancillary documents as may be reasonably necessary to implement the transaction (collectively, the "Transaction Documents"); and

WHEREAS, the City and the County desire to establish the principal terms and conditions upon which the parties have agreed and which will be reflected in the Transaction Documents;

NOW, THEREFORE, BE IT RESOLVED by Hickory City Council and the Catawba County Board of Commissioners as follows:

I. Authorization. The City and the County authorize the Transaction in substantial accordance with the framework, key terms, conditions, and limitations set forth below (the "Terms"):

a. City Asset Transfer:
    i. City transfers ownership of water and sewer infrastructure assets within Southeastern Catawba County and the Town of Catawba to Catawba County and retires its share of existing debt on this infrastructure.
    ii. City transfers to County $1.86M paid by Claremont to Hickory for wastewater treatment plant capacity.
    iii. County assumes ownership of and remaining capacity in H-C Wastewater Treatment Plant and associated lines, and of Claremont line from railroad crossing to H-C Wastewater Treatment Plant.
    iv. County assumes full customer service obligations and system rate-setting authority for customers served by this infrastructure.
b. County Asset Transfer:
    i. County transfers ownership of water lines / infrastructure commonly referred to as Blackburn, Banoak, Jamestown Subdivision, Mt Grove CDBG, Advent Crossroads, Blackburn Plateau and a portion of the SECC Water Supply Loop, and retires its share of existing debt on this infrastructure.
    ii. City purchases lines from County for $1.25M, paid in five (5) equal annual installments of $250,000 per year.
    iii. City assumes full customer service obligations and system rate-setting authority for customers served by this infrastructure.
    iv. County transfers capacity in the H-F Wastewater Treatment Plant to City.
c. Treatment Plant Capacity and Bulk Water Sales
    i. County maintains 1.7MGD capacity purchased in Hickory Water Treatment Plant Capacity Agreement dated June 16, 2003.
    ii. City agrees to sell County 300,000 gallons of capacity at $1.50/ gallon, at County's request, by December 31, 2031.
    iii. City agrees to sell County up to 1.5MGD in new or expanded water plant capacity, with purchase price determined by City based on proportional renovation and expansion costs.
    iv. City agrees to extend a $2.25M credit to County towards future purchase price.
    v. City agrees to sell bulk water to County and install master meters at delivery points.
d. Southeastern Catawba County Water and Sewer Operating and Maintenance Agreement
    i. County agrees to contract with City for operations and maintenance of County-owned water and wastewater infrastructure for a term of five (5) years, with option for one five (5) year extension. City shall provide a $50,000 annual credit for the first five (5) year term.
    ii. County agrees to fund upgrade of metering system to match Hickory's automated meter standard.

II. Integrated Transaction. Unless either party determines otherwise in writing, the Transaction Documents shall be finalized as components of an integrated transaction and shall contain coordinated terms governing their effectiveness, commencement, transition, default, termination, and expiration.

III. Performance Protections. The agreements shall include appropriate mutual provisions concerning insurance, indemnification, audit rights, compliance monitoring, corrective action,

events of default, cure periods, emergency intervention, termination rights, transition assistance, and protection of County property and public records. The agreements shall contain representations, warranties, covenants, indemnities, survival provisions, remedies, and limitations appropriate to the nature and value of the Transferred Assets and the appropriate allocation of risk.

IV. Delegated Authority. Subject to this Resolution, the City Manager and County Manager are authorized, for and on behalf of the City and the County, respectively, to:

a. finalize, execute, acknowledge, and deliver the Transaction Documents, except for documents conveying an interest in real property, such as deeds and easements;
b. complete and approve exhibits, schedules, asset lists, legal descriptions, service levels, performance standards, transition plans, closing statements, and other attachments;
c. make revisions determined to be necessary or advisable to complete the Transaction; and
d. take all other actions and execute all certificates, assignments, consents, notices, and ancillary instruments reasonably necessary to carry out the purposes of this Resolution.

V. Limitations on Authority. The authority granted by this Resolution does not permit the City Manager or County Manager to agree to any material term that:

a. materially changes the nature or scope of the Transaction described in this Resolution;
b. transfers material assets not within the Terms;
c. materially reduces required service levels, system capacity, water quality protections, oversight rights, or continuity-of-service protections; or
d. is otherwise materially inconsistent with the key terms, conditions, and limitations established by this Resolution.

VI. Further Board Approval. A proposed material deviation from the limitations in this Resolution shall be presented to the Board for approval before execution or effectiveness. The County Manager may approve nonmaterial changes, including changes necessary to correct errors, clarify language, conform cross-references, complete factual schedules, satisfy regulatory requirements, or improve the County's legal, financial, or operational position, provided that no such change materially alters the Transaction approved by the Board.

VII. Effective Date. This Resolution is effective upon its adoption. The Transaction Documents shall become effective or close only upon satisfaction of the conditions established by this Resolution and the applicable Transaction Documents.

Adopted this 16th day of November, 2026.

_____
C. Randall Isenhower, Chair
Catawba County Board of Commissioners

ATTEST:

_____
Dale R. Stiles, Clerk

MEMORANDUM

TO: Catawba County Board of Commissioners
FROM: Brian S. Myers, Tax Administrator
DATE: November 16, 2026
SUBJECT: 2027 Schedule of Values

REQUEST:
Staff requests the Board of Commissioners adopt a.) the proposed 2027 Schedules of Values, Standards, and Rules, and b.) the Present Use Value Schedule, as prescribed by North Carolina General Statutes, both of which will be used to value real property for the 2027 Property Revaluation, consistent with §105-317.

BACKGROUND:
Pursuant to a resolution adopted by the Board of Commissioners on September 18, 2023, Catawba County's next countywide revaluation will become effective January 1, 2027. Catawba County has approximately 95,000 parcels of land, all of which are required by state law to be appraised at 100% of market value as of the effective date of the revaluation.

To that end, staff has worked for many months analyzing data derived from qualified real estate sales, building cost data, and income and expense statements from income-producing properties in the County. This has culminated in the formulation of a proposed Schedule of Values, Standards, and Rules to be utilized to generate market value appraisals for all real property in Catawba County.

The Schedule of Values is a set of standards and rules used as an appraisal manual by County staff to assure properties are valued in an accurate and consistent manner. The schedule contains information on methods used to determine land and building values based upon criteria such as location, age, type of construction, zoning, income potential, cost, etc.

Also included in the proposed Schedule of Values is a special schedule for appraising eligible agricultural, horticultural, and forestland at its "present use" value. This schedule is a statewide schedule formulated by the North Carolina Department of Revenue. Properties whose owners qualify for "present use" assessment will receive two values: a market value mandated by law and a "present use" value.

The first step in the 2027 Revaluation process occurred on October 5th, when the Proposed Schedule of Values was submitted to the Board of Commissioners and a public hearing was set for November 2, 2026. In compliance with state statute, on October 6, 2026, the County published a statement publicizing the proposed Schedule of Values' submittal to the Board of Commissioners and availability for public inspection. The Board of Commissioners conducted the required public hearing on the proposed 2027 Schedule of Values, Standards, and Rules on November 2, 2026

This evening, staff recommends the Board of Commissioners consider adoption of the proposed 2027 Schedule of Values, Standards, and Rules. If the Board chooses to adopt the Schedule, a notice of this order of adoption shall be published once a week for four successive weeks (November 17, November 24, December 1, December 18) in a newspaper having general circulation.

After the Board's consideration of the proposed Schedule of Values this evening, staff anticipates the next step in the revaluation process to be providing the Board of Commissioners with an update in January 2027.

RECOMMENDATION:
Staff recommends the Board of Commissioners adopt a.) the proposed 2027 Schedules of Values, Standards, and Rules, and b.) the Present Use Value Schedule, as prescribed by North Carolina General Statutes, both of which will be used to value real property for the 2027 Property Revaluation, consistent with §105-317.

catawba county
tax office

2027 USE-VALUE MANUAL FOR

AGRICULTURAL, HORTICULTURAL AND FOREST LAND

Schedule of values, standards, and rules to be used in appraising real property enrolled in the Present-Use Value program in Catawba County for the reappraisal effective January 1, 2027.

CATAWBA COUNTY BOARD OF COMMISSIONERS

C. Randall Isenhower, Chair
Austin Allran, Vice-Chair
Barbara G. Beatty
Robert Abernethy
Cole Setzer

Adopted

_____

Date

Signed_____

Chairman

catawba county
tax office

SCHEDULE OF VALUES, STANDARDS, & RULES

2027 REAL PROPERTY REAPPRAISAL

Schedule of values, standards, and rules to be used in appraising real property in Catawba County for the reappraisal effective January 1, 2027.

CATAWBA COUNTY
BOARD OF COMMISSIONERS

C. Randall Isenhower, Chair
Austin Allran, Vice-Chair
Barbara G. Beatty
Robert Abernethy
Cole Setzer

Adopted

_____

Date

Signed_____

Chairman

MEMORANDUM

TO: Board of Commissioners

FROM: Mary Morrison, Chief Financial Officer

DATE: November 16, 2026

SUBJECT: Session Law 2026-41 Legislative Appropriation Directed Grants

REQUEST

Staff requests the Board of Commissioners:

1. Accept and appropriate legislatively directed grant funds ($500,000 towards Lake Norman Woods wastewater treatment infrastructure and $175,000 for Sheriff's Office equipment purchase); and
2. Authorize the County Manager to execute the required grant documents.

BACKGROUND

Through Session Law 2026-41 Catawba County was awarded legislatively directed grant funds in the amount of $500,000 to support replacement of a failing private wastewater package treatment plant owned by and serving the Lake Norman Wood Subdivision. The County was previously awarded a grant for this project in the amount of $1,000,000 in September 2025. County staff have been working with an engineering firm and have submitted the permitting application to the Department of Environmental Quality (DEQ) for approval, with an anticipated authorization to construct in November 2026. Upon receiving the authorization to construct from DEQ, the project will be placed out to bid for construction of the plant.

The County also received a legislative grant in the amount of $175,000 to purchase equipment for the Sheriff's Office. Equipment proposed to be purchased with grant funding includes armory equipment, night vision devices for specialized units, breaching equipment and tools, replacement and installation of metal shark seating in lake patrol boats, and Intrepid Response subscription.

These funds do not require any local matching funds. No additional appropriation is requested.

RECOMMENDATION

Staff recommends the Board of Commissioners:

1. Accept and appropriate legislatively directed grant funds ($500,000 towards Lake Norman Woods wastewater treatment infrastructure and $175,000 for Sheriff's Office equipment purchase); and
2. Authorize the County Manager to execute the required grant documents.

Supplemental Appropriation

Revenue

286-190050-630568	OSBM Grant-Lake Norman Woods	$500,000
286-210050-630565	OSBM Directed Grant	$175,000

Expenditure:

286-190050-868279	OSBM Grant Lake Norman Woods	$500,000
286-210050-870100	Minor Equipment	$175,000

MEMORANDUM

To: Catawba County Board of Commissioners

From: Jodi Stewart, County Attorney

Date: November 16, 2026

Subject: Sheriff's Bond

REQUEST

Staff requests the Board of Commissioners approve the official bond for Sheriff Don Brown.

BACKGROUND

North Carolina General Statute § 162-9 requires the Board of Commissioners obtain and approve the official bond for the Sheriff. The bond must be recorded in the Register of Deeds' Office and filed with the Clerk of Court. Human Resources Director Cynthia Eades has obtained the bond, which will be registered and filed once approved.

§ 162-9. County commissioners to take and approve bonds. The board of county commissioners in every county shall take and approve the official bond of the sheriffs, which they shall cause to be registered with the register of deeds and filed with the clerk of superior court. The bond shall be taken on or before the first Monday of December next after the election.

RECOMMENDATION

Staff recommends the Board of Commissioners approve the official bond for Sheriff Don Brown.

MEMORANDUM

TO: Board of Commissioners

FROM: Laura McBryde, Budget & Management Director

DATE: November 16, 2026

RE: Budget Amendment: Register of Deeds Automation & Preservation Fund

REQUEST
Staff requests the Board of Commissioners appropriate $55,570 in fund balance from the Register of Deeds Automation & Preservation Fund to address a projected shortfall in FY2027 budgeted funds.

BACKGROUND
Per Section 161-11.3 of the North Carolina General Statutes, the County must maintain an Automation Enhancement and Preservation Fund for the Register of Deeds, which is funded by 10% of the fees collected by the Register of Deeds and provides funding for expenses related to digitizing records for public access.

In Catawba County, this fund is primarily used to support a contracted service which provides digitization and imaging services for the Register of Deeds. This is the only purpose for which Automation and Preservation Fund dollars are used.

In October 2026, the Register of Deeds received a delayed invoice for services received the previous fiscal year. Because the invoice was received after the accounting window for FY26 closed, the budgeted funds planned to support the expenditure had been swept into fund balance. The $55,570 invoice has been paid using current fiscal year funds, which creates a projected funding shortfall for the FY27 digitization contract in the same amount. Resultantly, staff recommends appropriation of $55,570 in restricted revenues from the Automation and Preservation Fund to address this shortfall.

RECOMMENDATION
Staff recommends the Board of Commissioners appropriate $55,570 in fund balance from the Register of Deeds Automation & Preservation Fund to address a projected shortfall in FY2027 budgeted funds.

REVISION
Supplemental Appropriation:

Revenue:

160-160050-690100	Fund Balance Applied	$55,570.00

Expense:

160-160050-857900	Other Contractual Services	$55,570.00

M E M O R A N D U M

TO: Catawba County Board of Commissioners

FROM: Brian Myers, Tax Administrator

DATE: November 16, 2026

IN RE: Tax Release / Refund / Adjustment Request

REQUEST
Staff requests the Board of Commissioners approve 32 releases totaling $23,908.46, three refunds totaling $2,099.22, and 67 Motor Vehicles Bill adjustments / refunds totaling $4,402.01 requested during the month of October.

BACKGROUND
North Carolina General Statute 105-381(b) states upon receipt of a taxpayer's written request for release or refund, the taxing unit's governing body has 90 days to determine whether the taxpayer's request is valid to either approve the release or refund of the incorrect portion or to notify the taxpayer in writing that no release or refund will be made.

During the month of October, Tax Office staff have checked records and verified the legitimacy of 32 releases totaling $23,908.46, three refunds totaling $2,099.22, and 67 Motor Vehicle Bill adjustments / refunds totaling $4,402.01.

Common reasons for the refunds, releases, and adjustments include change in values, months, and situs, pro-ration of tax bills to account for mid-year transfers of ownership, businesses closing / being sold, clerical errors, and taxpayer listing errors. A detailed transaction summary is attached.

RECOMMENDATION
Staff recommend the Board of Commissioners approve 32 releases totaling $23,908.46, three refunds totaling $2,099.22, and 67 Motor Vehicle Bill adjustments / refunds totaling $4,402.01 requested during the month of October.

COMMISSIONER APPROVAL OF RELEASES & REFUNDS

TIME PERIOD: October 1, 2026 Thru October 31, 2026

PROCESSED: November 16, 2026

REGULAR RELEASES

MOTOR VEHICLE	$0.00
REAL & PERSONAL	$23,908.46
TOTALS	$23,908.46

REGULAR REFUNDS

MOTOR VEHICLE	
REAL & PERSONAL	
TOTALS	$2,099.22

NEW MOTOR VEHICLE SYSTEM REFUNDS (VTS)

MOTOR VEHICLE NCVTS	4,402.01

COUNTY GRAND TOTAL $26,007.68

RANDY ISENHOWER
CHAIRMAN OF THE BOARD
CATAWBA COUNTY BOARD OF COMMISSIONERS

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Address 1	Address 2	Address 3	Refund Type	Plate Number	Status	Refund Description	Refund Reason	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
ADAMS, KENDRICK EUGENE	2820 LEGACY RIDGE LN		CATAWBA, NC 28609	Adjustment >= $100	MDD3180	PENDING	Refund Generated due to adjustment on Bill #0093558000-2026-2026-0000-00	SLVG or RBLT TTL	CATA	TAX	($62.68)	$0.00	($62.68)
									C02	TAX	($78.64)	$0.00	($78.64)
												Refund	**$141.32**
ALLRED, KEONDRA DENISE	1010 33RD AVENUE LOOP NE		HICKORY, NC 28601	Proration	PHB1296	PENDING	Refund Generated due to proration on Bill #0086972306-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($54.13)	$0.00	($54.13)
									C05	TAX	($62.48)	$0.00	($62.48)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$116.61**
AUTON, DARRELL WAYNE	3157 44TH AVENUE DR NE		HICKORY, NC 28601	Adjustment < $100	1E899	PENDING	Refund Generated due to adjustment on Bill #0093338093-2025-2025-0000-00	Adjustment	CATA	TAX	($31.09)	$0.00	($31.09)
									F05	TAX	($9.67)	$0.00	($9.67)
												Refund	**$40.76**
BARNES-HOLDEN, CARMEN DENISE	6930 BAKERS MOUNTAIN RD		HICKORY, NC 28602	Proration	TAA4942	PENDING	Refund Generated due to proration on Bill #0090677743-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($27.03)	$0.00	($27.03)
									F03	TAX	($5.80)	$0.00	($5.80)
												Refund	**$32.83**
BARRINGER, ELLA LOUISE	2822 S NC 16 HWY		NEWTON, NC 28658	Proration	HAF4534	PENDING	Refund Generated due to proration on Bill #0046921431-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($6.29)	($0.32)	($6.61)
									F14	TAX	($1.75)	($0.09)	($1.84)
												Refund	**$8.45**
BENNER, CHRISTOPHER EDWARD	1985 CORDIA CIR		NEWTON, NC 28658	Proration	VEB1318	PENDING	Refund Generated due to proration on Bill #0085210784-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($24.29)	$0.00	($24.29)
									F09	TAX	($6.10)	$0.00	($6.10)
												Refund	**$30.39**
BENNER, JARRET EDWARD	3640 KIMBER LN		SHERRILLS FORD, NC 28673	Proration	ECA6677	PENDING	Refund Generated due to proration on Bill #0074160530-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($40.62)	$0.00	($40.62)
									F08	TAX	($10.09)	$0.00	($10.09)
												Refund	**$50.71**
BOLICK, BOBBY LEWIS	5540 37TH STREET DR NE		HICKORY, NC 28601	Proration	FDW6228	PENDING	Refund Generated due to proration on Bill #0051699441-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($28.64)	$0.00	($28.64)
									F05	TAX	($8.91)	$0.00	($8.91)
												Refund	**$37.55**
BOWMAN, NORMAN LONG	4126 6TH ST NW		HICKORY, NC 28601	Proration	BDD6468	PENDING	Refund Generated due to proration on Bill #0018238238-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($27.60)	$0.00	($27.60)
									F20	TAX	($8.66)	$0.00	($8.66)
												Refund	**$36.26**

BUOL, EVELYN ELSIE	22 S CENTER ST	UNIT 414	HICKORY, NC 28602	Proration	VHH2034	PENDING	Refund Generated due to proration on Bill #0088043213-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($7.19)	$0.00	($7.19)
									C05	TAX	($8.29)	$0.00	($8.29)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$15.48**
CAMPBELL, JOSHUA WAYNE	3552 BOGGS RD		CLAREMONT, NC 28610	Proration	JFW3618	PENDING	Refund Generated due to proration on Bill #0083380952-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($25.49)	$0.00	($25.49)
									F11	TAX	($8.32)	$0.00	($8.32)
												Refund	**$33.81**
CNN BUILDERS INC	2340 HORSESHOE BEND RD NE		HICKORY, NC 28601	Proration	MDC5058	PENDING	Refund Generated due to proration on Bill #0091149284-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($59.43)	$0.00	($59.43)
									F05	TAX	($18.49)	$0.00	($18.49)
												Refund	**$77.92**
COOK, CAROLINE PAIGE	655 40TH AVENUE LN NW		HICKORY, NC 28601	Proration	JMF2650	PENDING	Refund Generated due to proration on Bill #0088843683-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($50.77)	$0.00	($50.77)
									F20	TAX	($15.93)	$0.00	($15.93)
												Refund	**$66.70**
CURTIS, HAYDEN ANDERS	603 N CENTER ST		HICKORY, NC 28601	Proration	1WHLES	PENDING	Refund Generated due to proration on Bill #0076755871-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($57.67)	$0.00	($57.67)
									C05	TAX	($66.57)	$0.00	($66.57)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$124.24**
DAVIS, TONYA MICHELE	1417 34TH AVENUE LN NE		HICKORY, NC 28601	Proration	EDN5635	PENDING	Refund Generated due to proration on Bill #0084265810-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($67.48)	$0.00	($67.48)
									C05	TAX	($77.89)	$0.00	($77.89)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$145.37**
DEAL, CLYDE JUNIOR	4077 BRICKFIELD ST		HICKORY, NC 28602	Proration	KKY8703	PENDING	Refund Generated due to proration on Bill #0092421675-2026-2026-0000-00	Vehicle Sold	CATA	TAX	($250.52)	$0.00	($250.52)
									F03	TAX	($53.75)	$0.00	($53.75)
												Refund	**$304.27**
DEEB, GORDON PHILLIP	4048 BRANDERR DR		HICKORY, NC 28602	Proration	LLR3706	PENDING	Refund Generated due to proration on Bill #0091441444-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($115.83)	$0.00	($115.83)
									F04	TAX	($18.02)	$0.00	($18.02)
												Refund	**$133.85**
DEMPSEY, JAMES JOHN	4947 MARINA DR		SHERRILLS FORD, NC 28673	Proration	MDD4792	PENDING	Refund Generated due to proration on Bill #0092361578-2026-2026-0000-00	Vehicle Sold	CATA	TAX	($38.20)	$0.00	($38.20)
									F08	TAX	($9.49)	$0.00	($9.49)
												Refund	**$47.69**
DIAMOND, SHARA PERKINS	5055 SHERRILLS FORD RD		CATAWBA, NC 28609	Proration	LLV5136	PENDING	Refund Generated due to proration on Bill #0088659599-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($16.73)	($1.46)	($18.19)
									F09	TAX	($4.20)	($0.37)	($4.57)
												Refund	**$22.76**
ENGEMANN, KENNETH MICHAEL	4175 TODD ST		SHERRILLS FORD, NC 28673	Proration	KEP9902	PENDING	Refund Generated due to proration on Bill #0069745525-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($27.75)	$0.00	($27.75)
									F08	TAX	($6.89)	$0.00	($6.89)
												Refund	**$34.64**
ENGLISH, JULIA HUFFMAN	7293 W NC 10 HWY		VALE, NC 28168	Proration	RKK6339	PENDING	Refund Generated due to proration on Bill #0046573621-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($17.67)	$0.00	($17.67)
									F04	TAX	($2.75)	$0.00	($2.75)
												Refund	**$20.42**

FRIZZELL, JAMES CLINTON	3070 17TH STREET CT NE		HICKORY, NC 28601	Proration	WXP7225	PENDING	Refund Generated due to proration on Bill #0052594073-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($53.11)	$0.00	($53.11)
									C05	TAX	($61.30)	$0.00	($61.30)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$114.41**
GEER, JOYCE KNIPE	4852 KISER ISLAND RD		TERRELL, NC 28682	Proration	BFE6615	PENDING	Refund Generated due to proration on Bill #0067784602-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($9.28)	$0.00	($9.28)
									F08	TAX	($2.30)	$0.00	($2.30)
												Refund	**$11.58**
GROVER, EDWARD JOSEPH	605 8TH AVE SW UNIT 1A		CONOVER, NC 28613	Proration	ZX3455	PENDING	Refund Generated due to proration on Bill #0091420452-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($31.12)	$0.00	($31.12)
									C04	TAX	($30.85)	$0.00	($30.85)
									C04	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$61.97**
HAMM, STEVEN ROSS	603 6TH AVE NE		CONOVER, NC 28613	Proration	PJB9948	PENDING	Refund Generated due to proration on Bill #0014458876-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($10.48)	$0.00	($10.48)
									C04	TAX	($10.39)	$0.00	($10.39)
									C04	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$20.87**
HAMM, STEVEN ROSS	603 6TH AVE NE		CONOVER, NC 28613	Proration	PJB5874	PENDING	Refund Generated due to proration on Bill #0062618937-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($16.60)	$0.00	($16.60)
									C04	TAX	($16.45)	$0.00	($16.45)
									C04	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$33.05**
HANSEN, STEVEN JAY	6335 HUNTINGTON LN		CONOVER, NC 28613	Proration	RCW7130	PENDING	Refund Generated due to proration on Bill #0071353968-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($33.47)	$0.00	($33.47)
									F07	TAX	($5.12)	$0.00	($5.12)
												Refund	**$38.59**
HARDWICK, BOBBY ALLEN	1956 BARRINGER CIR		NEWTON, NC 28658	Adjustment < $100	HDV3524	PENDING	Refund Generated due to adjustment on Bill #0066839857-2025-2025-0000-00	SLVG or RBLT TTL	CATA	TAX	($14.35)	$0.00	($14.35)
									C08	TAX	($16.20)	$0.00	($16.20)
									C08	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$30.55**
HARRISON, CHRISTOPHER DONALD SIMMS	2580 MAHOGANY LN		HICKORY, NC 28602	Proration	JA17	PENDING	Refund Generated due to proration on Bill #0074977696-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($38.27)	($1.92)	($40.19)
									C05	TAX	($44.18)	($2.21)	($46.39)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$86.58**
HOLT, HENRY BRANSON JR	7024 SUMMER HILL DR		DENVER, NC 28037	Adjustment < $100	PHJ3301	PENDING	Refund Generated due to adjustment on Bill #0043815554-2026-2026-0000-00	Adjustment	CATA	TAX	($25.95)	$0.00	($25.95)
									F08	TAX	($6.44)	$0.00	($6.44)
												Refund	**$32.39**
HUFFMAN, TERESA LEWIS	125 27TH ST NW		HICKORY, NC 28601	Proration	CEH7466	PENDING	Refund Generated due to proration on Bill #0090321998-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($25.02)	$0.00	($25.02)
									C06	TAX	($30.14)	$0.00	($30.14)
												Refund	**$55.16**
INGLE, DAVID GRANT	420 8TH ST SW		CONOVER, NC 28613	Proration	WBL7693	PENDING	Refund Generated due to proration on Bill #0092298243-2026-2026-0000-00	Vehicle Sold	CATA	TAX	($47.52)	$0.00	($47.52)
									C04	TAX	($47.11)	$0.00	($47.11)
									C04	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$94.63**
JOHNSON, JAMES EDWARD JR	132 PLATINUM DR		LEXINGTON, SC 29072	Proration	KV2805	PENDING	Refund Generated due to proration on Bill #0080364996-2025-2025-0000-00	Reg . Out of state	CATA	TAX	($38.87)	$0.00	($38.87)
									F09	TAX	($9.75)	$0.00	($9.75)
												Refund	**$48.62**

JOHNSON, RICHARD WILLIAM	6638 LOVE POINT RD		DENVER, NC 28037	Proration	CR83317	PENDING	Refund Generated due to proration on Bill #0083607698-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($10.00)	$0.00	($10.00)
									F08	TAX	($2.48)	$0.00	($2.48)
												Refund	**$12.48**
KIRKPATRICK, MELISSA NOAH	5023 WATER WHEEL DR		CONOVER, NC 28613	Proration	JKW8448	PENDING	Refund Generated due to proration on Bill #0058547505-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($12.41)	$0.00	($12.41)
									F05	TAX	($3.86)	$0.00	($3.86)
												Refund	**$16.27**
KRUEGER, DANIEL LEE	218 WINDBER WAY		DAYTONA BEACH, FL 32117	Proration	FFB7732	PENDING	Refund Generated due to proration on Bill #0047848234-2025-2025-0000-00	Reg . Out of state	CATA	TAX	($39.96)	$0.00	($39.96)
									C05	TAX	($46.12)	$0.00	($46.12)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$86.08**
KRUEGER, JENNIFER LOUISE	218 WINDBER WAY		DAYTONA BEACH, FL 32117	Proration	H0RSGRLS	PENDING	Refund Generated due to proration on Bill #0062689293-2025-2025-0000-00	Reg . Out of state	CATA	TAX	($8.67)	$0.00	($8.67)
									C05	TAX	($10.00)	$0.00	($10.00)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$18.67**
KRUEGER, JENNIFER LOUISE	218 WINDBER WAY		DAYTONA BEACH, FL 32117	Proration	FFB7733	PENDING	Refund Generated due to proration on Bill #0089223514-2025-2025-0000-00	Reg . Out of state	CATA	TAX	($85.73)	$0.00	($85.73)
									C05	TAX	($98.96)	$0.00	($98.96)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$184.69**
KRUEGER, JENNIFER LOUISE	218 WINDBER WAY		DAYTONA BEACH, FL 32117	Proration	BLAST0FF	PENDING	Refund Generated due to proration on Bill #0076743132-2025-2025-0000-00	Reg . Out of state	CATA	TAX	($39.03)	$0.00	($39.03)
									C05	TAX	($45.05)	$0.00	($45.05)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$84.08**
LIBOLT, BARRY RANDAL	4352 ANDERSON MOUNTAIN RD		MAIDEN, NC 28650	Proration	WBL9780	PENDING	Refund Generated due to proration on Bill #0092249741-2026-2026-0000-00	Vehicle Sold	CATA	TAX	($21.10)	$0.00	($21.10)
									F09	TAX	($5.56)	$0.00	($5.56)
												Refund	**$26.66**
MASKE, MICHAEL KEITH	3029 11TH AVENUE DR NE		CONOVER, NC 28613	Proration	8V2041	PENDING	Refund Generated due to proration on Bill #0072065243-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($39.24)	$0.00	($39.24)
									F05	TAX	($12.21)	$0.00	($12.21)
												Refund	**$51.45**
MCCRARY, JEAN JENKINS	4455 REED CREEK DR	UNIT 106	SHERRILLS FORD, NC 28673	Proration	VCA2329	PENDING	Refund Generated due to proration on Bill #0078340436-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($13.15)	$0.00	($13.15)
									F08	TAX	($3.27)	$0.00	($3.27)
												Refund	**$16.42**
NELSON, JOHN CHARLES	2700 TRENT PINES CT		SHERRILLS FORD, NC 28673	Adjustment < $100	HDM1446	PENDING	Refund Generated due to adjustment on Bill #0053032165-2025-2025-0000-00	Adjustment	CATA	TAX	($44.76)	$0.00	($44.76)
									F08	TAX	($11.12)	$0.00	($11.12)
												Refund	**$55.88**
PARKER, CALEB NATHANIEL	3756 DERICAS CT		CLAREMONT, NC 28610	Adjustment < $100	TLM1725	PENDING	Refund Generated due to adjustment on Bill #0072559691-2025-2025-0000-00	Mileage	CATA	TAX	($49.13)	$0.00	($49.13)
									F07	TAX	($7.52)	$0.00	($7.52)
												Refund	**$56.65**
PERKINS, JAMES MONROE	2161 CAPES COVE DR		SHERRILLS FORD, NC 28673	Adjustment < $100	TW7434	PENDING	Refund Generated due to adjustment on Bill #0091535665-2025-2025-0000-00	Adjustment	CATA	TAX	($57.67)	$0.00	($57.67)
									F08	TAX	($14.33)	$0.00	($14.33)
												Refund	**$72.00**

POPE, BETTY REEVES	1205 11TH ST NW		HICKORY, NC 28601	Proration	JDE1727	PENDING	Refund Generated due to proration on Bill #0060215485-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($21.10)	$0.00	($21.10)
									C05	TAX	($24.37)	$0.00	($24.37)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$45.47**
POTTORFF, BRYAN KEITH	1260 5TH STREET NE APT 72		HICKORY, NC 28601	Proration	WAC6164	PENDING	Refund Generated due to proration on Bill #0089258696-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($4.18)	$0.00	($4.18)
									F05	TAX	($1.30)	$0.00	($1.30)
												Refund	**$5.48**
RAYFIELD, BARRY DEAN	3410 37TH STREET CT NE		HICKORY, NC 28601	Proration	THC6960	PENDING	Refund Generated due to proration on Bill #0083160869-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($20.48)	$0.00	($20.48)
									F05	TAX	($6.37)	$0.00	($6.37)
												Refund	**$26.85**
REESE, CHRISTOPHER ROBERT	3726 SILVER ST		CLAREMONT, NC 28610	Proration	EBX7915	PENDING	Refund Generated due to proration on Bill #0070762001-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($23.30)	$0.00	($23.30)
									F07	TAX	($3.57)	$0.00	($3.57)
												Refund	**$26.87**
REX, GEORGE WESLEY	3628 KIMBER LN		SHERRILLS FORD, NC 28673	Proration	LMN5628	PENDING	Refund Generated due to proration on Bill #0088950481-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($49.10)	$0.00	($49.10)
									F08	TAX	($12.20)	$0.00	($12.20)
												Refund	**$61.30**
REYES, IRMA MERCEDES	1445 4TH STREET DR NW	APT 49	HICKORY, NC 28601	Proration	LJJ7569	PENDING	Refund Generated due to proration on Bill #0091503372-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($92.56)	$0.00	($92.56)
									C05	TAX	($106.85)	$0.00	($106.85)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$199.41**
REYNOLDS, MICHAEL MARION	403 5TH ST NE		CONOVER, NC 28613	Proration	RLY7141	PENDING	Refund Generated due to proration on Bill #0092907170-2026-2026-0000-00	Vehicle Sold	CATA	TAX	($103.27)	$0.00	($103.27)
									C04	TAX	($102.37)	$0.00	($102.37)
									C04	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$205.64**
RODRIGUEZ DIAZ, CARLOS XAVIER	7933 RIVER BEND RD		CLAREMONT, NC 28610	Proration	HDT2936	PENDING	Refund Generated due to proration on Bill #0079946983-2025-2025-0000-00	Vehicle Totalled	CATA	TAX	($27.91)	$0.00	($27.91)
									F07	TAX	($4.27)	$0.00	($4.27)
												Refund	**$32.18**
SHIPLEY, XEREK MICHAEL	9 N 11TH AVE		MAIDEN, NC 28650	Proration	RMD8788	PENDING	Refund Generated due to proration on Bill #0093466004-2026-2026-0000-00	Vehicle Sold	CATA	TAX	($26.04)	$0.00	($26.04)
									C07	TAX	($24.83)	$0.00	($24.83)
												Refund	**$50.87**
SIGMON, JOSHUA MICHAEL	2919 SIGMON DAIRY RD		NEWTON, NC 28658	Adjustment < $100	VFC9953	PENDING	Refund Generated due to adjustment on Bill #0090118010-2025-2025-0000-00	Adjustment	CATA	TAX	($22.75)	$0.00	($22.75)
									F14	TAX	($6.34)	$0.00	($6.34)
												Refund	**$29.09**
SIPES ORCHARD HOME	4431 COUNTY HOME RD		CONOVER, NC 28613	Adjustment < $100	KCR4487	PENDING	Refund Generated due to adjustment on Bill #0069232863-2026-2026-0000-00	Exempt Property	CATA	TAX	($34.59)	$0.00	($34.59)
									F05	TAX	($10.76)	$0.00	($10.76)
												Refund	**$45.35**

SIPES ORCHARD HOME	4431 COUNTY HOME RD		CONOVER, NC 28613	Adjustment < $100	KCR4488	PENDING	Refund Generated due to adjustment on Bill #0069232927-2026-2026-0000-00	Exempt Property	CATA	TAX	($31.24)	$0.00	($31.24)
									F05	TAX	($9.72)	$0.00	($9.72)
												Refund	**$40.96**
STARNES, CHARLES WILLARD JR	932 13TH ST SE		HICKORY, NC 28602	Adjustment < $100	CLZ3469	PENDING	Refund Generated due to adjustment on Bill #0023094477-2026-2026-0000-00	Adjustment	CATA	TAX	($13.53)	$0.00	($13.53)
									C05	TAX	($15.61)	$0.00	($15.61)
									C05	VEHICLE FEE	($1.00)	$0.00	($1.00)
												Refund	**$30.14**
TAIJI GROUP USA INC	405 WORTHA HERMAN RD SW		CONOVER, NC 28613	Proration	TAIJI1	PENDING	Refund Generated due to proration on Bill #0065596507-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($104.84)	$0.00	($104.84)
									F11	TAX	($34.20)	$0.00	($34.20)
												Refund	**$139.04**
TAIJI GROUP USA INC	405 WORTHA HERMAN RD SW		CONOVER, NC 28613	Proration	DDR7453	PENDING	Refund Generated due to proration on Bill #0070806721-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($45.72)	$0.00	($45.72)
									F11	TAX	($14.91)	$0.00	($14.91)
												Refund	**$60.63**
TUBBS, FRANK FLETCHER	7240 STATIC WAY		SHERRILLS FORD, NC 28673	Proration	S911F	PENDING	Refund Generated due to proration on Bill #0040716825-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($7.65)	$0.00	($7.65)
									F08	TAX	($1.90)	$0.00	($1.90)
												Refund	**$9.55**
WIEBKING, WILLIAM HENRY III	2426 WELLESBOURNE LN		SHERRILLS FORD, NC 28673	Proration	JCM2834	PENDING	Refund Generated due to proration on Bill #0070716344-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($5.93)	$0.00	($5.93)
									F08	TAX	($1.47)	$0.00	($1.47)
												Refund	**$7.40**
WILLETT, NADINE LOUISE	1483 20TH AVE NE		HICKORY, NC 28601	Adjustment < $100	LKY3877	PENDING	Refund Generated due to adjustment on Bill #0091419177-2025-2025-0000-00	Adjustment	CATA	TAX	($1.34)	$0.00	($1.34)
									C05	TAX	($1.54)	$0.00	($1.54)
									C05	VEHICLE FEE	$0.00	$0.00	$0.00
												Refund	**$2.88**
WIXON, ANDREW BRADLEY	2113 CLIFTON RD		SHERRILLS FORD, NC 28673	Proration	ZX5210	PENDING	Refund Generated due to proration on Bill #0090833533-2025-2025-0000-00	Vehicle Sold	CATA	TAX	($233.90)	$0.00	($233.90)
									F08	TAX	($58.11)	$0.00	($58.11)
												Refund	**$292.01**
XIONG, A	2924 JACK WHITENER RD		NEWTON, NC 28658	Proration	HKF7775	PENDING	Refund Generated due to proration on Bill #0073232421-2026-2026-0000-00	Vehicle Sold	CATA	TAX	($120.59)	$0.00	($120.59)
									F10	TAX	($29.75)	$0.00	($29.75)
												Refund	**$150.34**
YANG, JUNE DERAH	1630 TATE BLVD SE		HICKORY, NC 28602	Proration	LJN8103	PENDING	Refund Generated due to proration on Bill #0084765871-2025-2025-0000-00	Tag Surrender	CATA	TAX	($65.67)	$0.00	($65.67)
									F03	TAX	($14.09)	$0.00	($14.09)
												Refund	**$79.76**
YOUNG, CAROLYN MORRISON	4613 OLD SHELBY RD		HICKORY, NC 28602	Adjustment < $100	VZB8204	PENDING	Refund Generated due to adjustment on Bill #0001223936-2026-2026-0000-00	Adjustment	CATA	TAX	($24.25)	$0.00	($24.25)
									F17	TAX	($4.78)	$0.00	($4.78)
												Refund	**$29.03**
												Refund Total	**$4402.01**

Release SUBJECT TO BOARD APPROVAL ON [redacted]

Abstract Number (Please include leading zeros)	Year For which release/refund requested	Owner Name as Billed (Last, First, Middle)	Release or Refund?	Original Value	Corrected Value	Release / Refund Amount	Reason (Please do not use all CAPS. Use correct capitalization)
3066898	2025	BEARD ALVIN EUGENE II	Release	6,720	0	$37.67	Adjusted billing to remove untagged motor vehicle relocated to SC during May of 2024.
3067078	2022	BONDI JOHN DOMINIC	Release	2,590	0	$19.80	Adjusted billing to correct camper ownership, camper was retitled 12/2021. Corrected owner was billed for tax years 2022 through present.
3014417	2026	BONDI JOHN JASON	Release	2,100	0	$12.07	Adjusted billing to correct camper ownership, camper was retitled 12/2021. Corrected owner was billed for tax years 2022 through present.
3079323	2025	BONDI JOHN JASON	Release	2,100	0	$12.07	Adjusted billing to correct camper ownership, camper was retitled 12/2021. Corrected owner was billed for tax years 2022 through present.
3079323	2024	BONDI JOHN JASON	Release	2,100	0	$12.07	Adjusted billing to correct camper ownership, camper was retitled 12/2021. Corrected owner was billed for tax years 2022 through present.
3079323	2023	BONDI JOHN JASON	Release	2,330	0	$12.88	Adjusted billing to correct camper ownership, camper was retitled 12/2021. Corrected owner was billed for tax years 2022 through present.
3020294	2026	BSN MEDICAL INC	Release	1,910,653	1,896,670	$110.95	Adjusted billing to correct assessment due to listing errors by taxpayer. Amended listing was received.
67492	2026	C C ROYAL PROPERTIES LLC	Release	527,700	522,100	$44.44	Land Records processed a memorandum for ROW acquisition that was effective in 2024.
3067543	2025	CHAPPELL GORDON S	Release	76,963	0	$422.03	Adjusted billing to remove doublewide sold 12/10/2024. A Declaration of Intent was recorded 12/10/2024 and dwelling is now billed as real property for tax year 2025 through present.
3004384	2026	CHAPPELL GORDON S	Release	74,626	0	$413.32	Adjusted billing to remove doublewide sold 12/10/2024. A Declaration of Intent was recorded 12/10/2024 and dwelling is now billed as real property for tax year 2025 through present.
3033608	2026	CISNEROS KIM	Release	15,309	0	$83.79	Adjusted billing to remove watercraft located and billed in Lincoln County for tax years 2024 through 2026. Watercraft was relocated to Catawba during 2026 and will be added to the 2027 tax roll.
3089236	2025	CISNEROS KIM	Release	16,056	0	$87.87	Adjusted billing to remove watercraft located and billed in Lincoln County for tax years 2024 through 2026. Watercraft was relocated to Catawba during 2026 and will be added to the 2027 tax roll.
3089236	2024	CISNEROS KIM	Release	16,803	0	$91.03	Adjusted billing to remove watercraft located and billed in Lincoln County for tax years 2024 through 2026. Watercraft was relocated to Catawba during 2026 and will be added to the 2027 tax roll.
2607	2026	COULTER ROBBIN	Release	397,300	122,900	$1,425.50	Corrected the amount that should have been deferred.
6016920	2026	GONZALEZ MARIA EXIQUIA	Release	25,270	25,270	$723.14	Adjusted billing to remove motor vehicle registered in CA during billed gap period.
6002240	2026	HUGHES JASON DAVID	Release	16,050	16,050	$284.84	Adjusted billing to remove motor vehicle registered in NJ during billed gap period.

Release SUBJECT TO BOARD APPROVAL C

Abstract Number (Please include leading zeros)	Year For which release/refund requested	Owner Name as Billed (Last, First, Middle)	Release or Refund?	Original Value	Corrected Value	Release / Refund Amount	Reason (Please do not use all CAPS. Use correct capitalization)
6005069	2025	LAWS BRUCE WAYNE II	Release	18,660	18,660	$354.56	Adjusted billing to remove motor vehicle registered in and billed by Lincoln County during billed gap period.
6015936	2026	MILLER JARED TEIL	Release	6,640	6,640	$123.51	Adjusted billing to remove motor vehicle registered in and billed by Lincoln County during billed gap period.
3018143	2026	MORRIS GEORGE DAVID	Release	13,980	0	$80.35	Adjusted billing to remove mobile home demolished 07/21/2025.
3009228	2026	NICHOLSON SYLVIA ANN	Release	8,982	3,330	$48.40	Adjusted billing to remove utility trailer sold 09/18/2024.
3101306	2025	NICHOLSON SYLVIA ANN	Release	10,124	3,690	$55.10	Adjusted billing to remove utility trailer sold 09/18/2024.
3012653	2026	PARISH WILLIAM	Release	192,661	0	$1,729.33	Business sold and new owner did list for tax year 2026. Removed duplicated assessment due to non-listing by previous owner.
3026625	2026	QUALITY PROPANE INC	Release	576,334	0	$3,153.99	Business sold during 2023. Assets were moved and listed in Lincoln county for tax years 2024 until present.
2992785	2025	QUALITY PROPANE INC	Release	523,940	0	$2,867.26	Business sold during 2023. Assets were moved and listed in Lincoln county for tax years 2024 until present.
2992785	2024	QUALITY PROPANE INC	Release	476,309	0	$2,580.40	Business sold during 2023. Assets were moved and listed in Lincoln county for tax years 2024 until present.
3034391	2026	RICHARDS THERESA C	Release	4,251	0	$23.26	Adjusted billing to remove mobile home removed and replaced with new dwelling not billed as real property for tax year 2026.
6015149	2026	SPENCER CHAD AARON	Release	10,450	10,450	$105.24	Adjusted billing to remove motor vehicle registered in KY during billed gap period.
6015148	2026	SPENCER CHAD AARON	Release	5,800	5,800	$36.50	Adjusted billing to remove motor vehicle registered in KY during billed gap period.
3022454	2026	UTILIPLEX LLC	Release	379,165	124,366	$2,406.20	Adjusted billing to remove aircraft located and billed in Burke County.
3010732	2026	WHITE JAMES R JR	Release	27,230	0	$149.02	Adjusted billing to remove watercraft sold. New owner completed notice unlisted personal property confirming the new ownership.
6001503	2026	XIONG KA ZOUA	Release	5,050	5,050	$174.96	Adjusted billing to remove motor vehicle registered in FL during billed gap period.
3015913	2026	YUAPPAREL CORPORATION	Release	713,400	0	$6,226.91	Business closed and was dissolved 12/14/2025.
				6,067,646	**2,760,976**	**$23,908.46**	

Refund SUBJECT TO BOARD APPROVAL O

Abstract Number (Please include leading zeros)	Year For which release/refund requested	Owner Name as Billed (Last, First, Middle)	Release or Refund?	Original Value	Corrected Value	Release / Refund Amount	Reason (Please do not use all CAPS. Use correct capitalization)
3025631	2026	BSN MEDICAL INC	Refund	1,199,190	1,087,135	$961.99	Adjusted billing to correct assessment due to listing errors by taxpayer. Amended listing was received.
67492	2025	C C ROYAL PROPERTIES LLC	Refund	527,700	522,100	$44.44	Land Records processed a memorandum for ROW acquisition that was effective in 2024.
3101749	2025	CAIRO MEDITERRANEAN CAFE INC	Refund	115,720	0	$1,092.79	Business closed during November of 2024.
				1,842,610	**1,609,235**	**$2,099.22**	