

Special Strategic Planning and Budget Retreat

Meeting Minutes

April 27, 2026, 7:00 PM

1102 Unionville Church Road, Monroe, NC 28110, US

1. Call to Order

The meeting was called to order at 7:00 PM on Monday, April 27, 2026, at Unionville Town Hall, 1102 Unionville Church Road, Monroe, NC 28110. The Pledge of Allegiance was recited, followed by an invocation led by Councilman Jeff Broadaway. Mayor Baucom, Mayor Pro Tem Andrew Benton, Jeff Broadaway, Lana Kirkpatrick, Gene Price, Jaren Simpson, and staff were present. Attorney Ken Helms was absent.

2. Welcome & Retreat Overview

Mayor Randy Baucom welcomed those in attendance and explained the purpose of the retreat. He noted that this type of planning session had not been held before, but that the anticipated increase in capital expenditures made it prudent to establish the Council's priorities ahead of the formal budget process. The goal was to give Finance Officer Darrell Baucom a clearer sense of the Council's spending intentions for the upcoming fiscal year.

3. State of the Town

Finance Officer Darrell Baucom provided an overview of the Town's current financial position, referencing a 25-page prepared packet distributed to all members. He recommended that members number the pages for ease of reference during the discussion.

Highlighting recent accomplishments, Baucom noted the completion of the Town Hall renovation and the receipt of a park donation from the Piedmont Recreation Association. He acknowledged that the Town had incurred significant expenses related to the park, including insurance, maintenance, waste removal, and driveway repairs.

For the current fiscal year (FY 2025–2026), Baucom referenced pages 4 through 11 of the packet, which detailed estimated expenditures. Notable line items included \$133,000 for the park, \$52,000 for the UDO update, and \$50,000 budgeted for the America's 250th Celebration.

Turning to the preliminary FY 2026–2027 budget overview (pages 14–15), Baucom projected total revenues of approximately \$676,000, based on a 2-cent tax rate. This figure included an estimated \$235,000 in ad valorem taxes, \$90,000 in investment income, approximately \$200,000 in franchise taxes, and \$80,000 in sales and use taxes. Estimated total expenses were approximately \$558,000, leaving a projected excess of \$118,000. He noted that no capital outlay had been included in the estimate.

The Town's balance sheet (page 19) showed total cash holdings of approximately \$4.2 million, with approximately \$3.7 million invested in a money market account at Pinnacle Bank and approximately \$500,000 in the operating checking account. Baucom noted that the Town was well-positioned to fund capital improvements as needed, and that the large fixed asset figure on the balance sheet was largely attributable to the park donation.

4. Strategic Priorities

Community growth and development

Mayor Baucom and Clerk/Tax Collector/Land Use Administrator Melody Braswell discussed the primary drivers of community growth and development for the coming year. Braswell identified the following areas as the most significant budget considerations: parks and recreation, code enforcement, the ongoing UDO update, staffing, planning and land use, and public safety.

Infrastructure maintenance and improvement

Regarding the critical intersection at Unionville Indian Trail Road, Mayor Baucom reported that the project had moved inside the top five priorities on the project list. Braswell noted that the project timeline would likely span several years due to the complexity of state project pipelines. The total project estimate is approximately \$750,000, and the Town will be asked to provide some level of matching funds when the time comes. Braswell also reported that she had contacted NCDOT to request a reduction in the posted speed limit on Unionville Indian Trail Road from 55 mph to 45 mph through the intersection, and that she had not yet received a response.

Parks, recreation, and community events

Council discussed the current condition of Noel Williams Park, recently received from the Piedmont Recreation Association. Recent plumbing issues, including non-functioning urinals and a commode replacement, had been addressed. Ongoing concerns were raised about the maintenance of the restroom facilities given the high volume of park users, particularly during tournament season. Braswell indicated she had solicited a cleaning estimate from the Town's current cleaning contractor and was also awaiting an estimate from Servpro. The Council discussed the frequency of cleaning services needed, with Braswell recommending a minimum of two to three times per week during peak season.

Council also discussed the condition of the park grounds, including a large pile of dirt on the west side of the property, originally hauled from Piedmont High School when the athletic field was turfed. Mayor Baucom suggested that the dirt could be moved to the lower-lying east side to improve drainage, create additional parking, and open up usable space. However, Councilman Broadaway and Finance Officer Baucom both recommended deferring any such grading work until the engineering and park planning process being conducted by Benesch was completed. Braswell confirmed that Benesch had requested that a community meeting be scheduled as part of the park planning process, and that Council should begin considering available dates for such an event.

Regarding potential grant funding for park improvements, Finance Officer Baucom noted that the Town had never previously received a parks and recreation grant, which he believed would strengthen its application. He indicated that the state's parks and recreation grant program could fund up to \$600,000–\$700,000 in total project costs, with the Town responsible for a matching share. Benesch was expected to assist with the grant application process.

5. Fiscal Year 2026–2027 Budget Priorities & Funding Discussion

Council reviewed each functional budget area and assigned a priority level as follows:

- Priority 1 — Essential/Ongoing: Must be funded to maintain current operations
- Priority 2 — Important/Planned: Supports growth or addresses known needs
- Priority 3 — Aspirational: Desirable but contingent on available funds

5.1 Administration & Operations

Council designated Administration and Operations as Priority 1. This area encompasses staffing and administrative resources, office technology, professional and legal services, and insurance and compliance costs.

5.2 Code Enforcement & Permitting

Code Enforcement and Permitting was designated Priority 2. The Town currently contracts its code enforcement services through N-Focus. Braswell reported that she had been working with N-Focus to implement a permitting software solution. She indicated she would continue to follow up on that matter.

5.3 Parks & Recreation

Parks and Recreation was designated Priority 1 by the Council. Discussion focused primarily on the ongoing maintenance needs at Noel Williams Park, including restroom servicing, drainage improvements, and general grounds upkeep.

5.4 Community Events & Engagement

Community Events and Engagement was designated Priority 2. This area includes the America's 250th Celebration scheduled for June 27, 2026, and the Town's annual charitable contribution request process.

Braswell proposed a revised approach to the charitable contribution process, suggesting that the Town establish a defined grant cycle with a set annual funding pool. Under her proposal, applications would be accepted during a designated window, reviewed by a committee, and disbursements would be made on a defined schedule. Once funds were expended for the cycle, no further awards would be made until the following year. Councilman Broadaway expressed general support for the proposal, stating that he liked the idea of a defined deadline for applications and a committee review structure, which would add accountability to the process and remove pressure from the full Council. He suggested the Council revisit the specifics of the proposal after completing the evening's full agenda.

Finance Officer Baucom noted that the current annual charitable contributions budget was approximately \$110,000, and suggested that figure could serve as the starting point for the new grant cycle. It was discussed that the Fire Department and Community Center contributions, currently categorized under charitable contributions, might be more appropriately reclassified. Councilman Gene Price indicated he did not believe the Fire Department contribution should be categorized as a charitable contribution, and Finance Officer Baucom suggested it could instead be labeled under public safety.

5.5 Public Safety

Public Safety was designated Priority 1.

Off-duty officer and security coordination

Braswell noted that an off-duty officer is currently scheduled for each regular Town Council meeting, which was characterized as standard practice.

Unionville Volunteer Fire Department — Kevin Philemon, Unionville VFD Fire Chief

Fire Chief Kevin Philemon presented the Unionville Volunteer Fire Department's plans for a third fire station, to be located at New Salem Road and Old Camden Road. Chief Philemon explained that the new station would address several identified needs: improving ISO insurance ratings for residents currently outside the 5- and 6-mile service radius from existing stations, reducing response times in the southeast portion of the fire district (currently averaging over 10.5 minutes), and accommodating future growth.

The Department's two existing stations are Station 21 (built 1998, 11,000 sq. ft., staffed 24/7 with two firefighters plus daytime coverage Monday–Friday) and Station 22 (built 2008, 9,500 sq. ft., staffed Monday–Friday 7 AM–5 PM with no overnight capacity). Chief Philemon noted that the new station is designed at 8,000 square feet with four bedrooms, enabling future 24/7 staffing. The projected opening is late next year.

Chief Philemon provided an overview of the current ISO classification system, noting that the Department holds a Class 3 rating and narrowly missed a Class 2 in the most recent grading cycle. The new station was projected to improve the department's deployment analysis score, which accounts for 20 percent of the ISO rating. Several neighborhoods currently rated at Class 9 or Class 10—including Helms Pond, Farm Wood Drive, Venture Oaks, Irongate, Essex Pointe, and St. Regis Court—would benefit from the new station's placement.

Total projected construction costs were estimated at \$4.42 million, inclusive of planning, permitting, site work, construction, materials, and a 10 percent contingency. Chief Philemon noted that civil drawings had not yet been finalized and that costs could potentially be reduced by several hundred thousand dollars. The Department selected DR Reynolds as the design-build contractor based on competitive interviews and the firm's experience with comparable projects including Fairview Fire Station 3. Financing is expected to be arranged through Home Trust Bank.

Deputy Chief Matt Hinson presented a financing summary illustrating that the monthly payment burden on the Department's budget would decrease significantly with each additional dollar placed as a down payment. The

Department indicated it had not yet received Union County's budget contribution for the project, with the county budget expected in mid-to-late May and adoption anticipated at the second meeting in June.

Chief Philemon formally requested a contribution of \$1,000,000 from the Town of Unionville, either as a lump sum or paid over the life of the loan. Finance Officer Baucom calculated that \$70,000 per year over 15 years would satisfy this commitment. Councilman Price noted that, combined with the Town's existing annual contribution of \$60,000 (currently directed to apparatus funding), the total annual commitment to the Fire Department would be approximately \$130,000. Council indicated openness to the request but noted that a final decision would depend on the County's contribution amount.

Chief Philemon also outlined future capital needs, including a 2025 engine refurbishment at approximately \$95,000; a brush truck in FY 2026–2027 at approximately \$250,000; a 2009 engine replacement estimated at \$900,000; a 2030 engine replacement estimated at \$1,000,000; a 2033 engine replacement at \$1,000,000; and potential refurbishment of the 2014 rescue truck at an estimated \$500,000. He further projected increased operating costs of approximately \$123,000 for Monday–Friday staffing at the new station, \$35,000 in increased utility and maintenance costs, and a potential additional \$336,000 should the station be converted to 24/7 staffing.

5.6 Infrastructure & Facilities

Infrastructure and facilities were designated as Priority 2. Town Hall was noted to be in good condition following the recent renovation. The Town's grounds maintenance contract with Refined Outdoors was described as performing consistently, with the contractor also providing holiday decorations. The Town's \$4,000 commitment to the Union County critical intersection project was acknowledged, with a larger matching fund obligation anticipated in future years. The Town also supports the Unionville Community Center through contributions toward utilities and internet service, as well as periodic support for capital repairs such as roofing and tree work.

5.7 Planning & Land Use

Planning and Land Use was designated Priority 1 by Councilman Andrew Benton, reflecting the importance of maintaining the Town's ordinances in compliance with state law. The UDO update, administered through N-Focus, was discussed. Finance Officer Baucom indicated the work was expected to be substantially complete by August, with approximately \$13,500 remaining to be spent in FY 2026–2027. Braswell reported that the fee schedule had not been comprehensively reviewed in some time, noting that the annexation fee in particular was very low at \$250. She agreed to research fee schedules from comparable municipalities and present findings to Council at the next regular meeting for potential adjustments.

5.8 Staffing & Administrative Capacity

Staffing and Administrative Capacity was designated Priority 2 by Councilman Broadaway. Braswell reported that she continued to attend professional development opportunities to maintain compliance with state regulations. Deputy Clerk Sonya Gaddy had also been assisting on a weekly basis in preparation for the America's 250th Celebration.

6. Capital Improvements Discussion

Braswell presented a Capital Improvement Plan she had developed to provide rough estimates of when major budget items across Town-owned facilities would require attention or replacement, with the goal of avoiding costly surprises. Key findings included:

Town Hall was found to be in good condition with respect to HVAC, roof, electrical, plumbing, and parking. A noted exception was the front porch exterior light, which required attention.

Noel Williams Park was identified as having several near-term needs, including the parking lot and entrance, restroom facilities, and drainage. The picnic shelter was noted to be in good condition. Soccer fields currently lack lighting, and signage could be updated. Braswell noted that the existing asphalt driveway was shallow and lacked proper grade, making it susceptible to accelerated deterioration.

Council identified a suggested prioritization for park capital projects: (1) Parking lot and entrance improvements, (2) Restroom renovations, and (3) Walking trail and playground development. Councilman Broadaway noted that all three of these items were expected to be incorporated into the Benesch engineering

plan, and that the Town should await that plan before committing to specific timelines or cost estimates. Mayor Baucom agreed that the Town could manage with current conditions until the engineering plan was received.

Finance Officer Baucom noted that the Town's auditor had observed that all of these improvements should be achievable within the Town's budget without drawing down surplus reserves.

7. Next Steps & Action Items

Council reviewed the preliminary FY 2026–2027 budget framework presented by Finance Officer Baucom, built on an assumed 2-cent property tax rate. Mayor Baucom expressed a clear preference for maintaining the 2-cent rate, noting that recent property revaluations had already been a significant financial shock for residents. Finance Officer Baucom agreed, pointing to the \$4 million in reserve as evidence that the current rate was sufficient to meet the Town's needs. He noted that each additional penny on the tax rate generates approximately \$115,000 in revenue, and that the neighboring Town of Fairview had recently increased its rate to 4 cents.

The following action items and follow-up responsibilities were identified:

- Melody Braswell will follow up on the Capital Improvement Plan after the Benesch engineering plan for Noel Williams Park has been completed.
- Melody Braswell will research fee schedules from comparable municipalities and present recommendations for Council consideration at the next regular meeting.
- Melody Braswell will research a formal grant cycle process for charitable contributions and present a proposal to Council.
- Fire Chief Kevin Philemon will follow up with the Town after Union County's budget is released to provide clarity on the County's contribution to the new fire station project.
- Finance Officer Darrell Baucom will continue to develop the FY 2026–2027 budget draft, leaving the capital outlay line open pending further information from the County on the Fire Department contribution and from Benesch on park costs.
- Melody Braswell will coordinate a community meeting date with Benesch for the Noel Williams Park planning process.
- The fee schedule review will be tied to the annual budget process going forward, with Braswell preparing a draft for Council review at the next regular meeting.
- The tax rate for FY 2026–2027 is expected to remain at 2 cents, subject to final budget deliberations.

8. Adjournment

There being no further business, the meeting was adjourned.

Respectfully submitted,

Melody Braswell
Clerk/Tax Collector/Land Use Administrator

Approved as to form:

R. Kenneth Helms, Jr., Town Attorney

Note: These minutes were drafted with the assistance of Clerk Minutes by HeyGov. All content was reviewed and approved by the Clerk/Tax Collector/Land Use Administrator prior to submission.