Council Members
District 1: Stuart Graham
District 2: Charlene McGriff
District 3: Billy Mosteller, Vice Chair
District 4: Jose Luis
District 5: Steve Harper
District 6: Bryant Neal, Secretary
District 7: Brian Carnes, Chair

Lancaster County
South Carolina

Interim County Administrator
Steve Willis

County Attorney
Ginny L. Merck-Dupont

Clerk to Council
Sherrie Simpson

January 29, 2026
8:30 AM

LANCASTER COUNTY COUNCIL
RETREAT WORKSHOP

LANCASTER COUNTY MAIN LIBRARY,
313 SOUTH WHITE STREET, LANCASTER, SC 29720

MINUTES

Council Members Present: Brian Carnes, Steve Harper, Jose Luis, Charlene McGriff, Bryant Neal, Stuart Graham

Council Member Absent: Billy Mosteller

Staff Members/Others Present: Steve Willis, Interim County Administrator; Ginny Merck-Dupont, County Attorney; Sherrie Simpson, Clerk to Council; Stephany Snowden, Deputy County Administrator; Sabrena Harris, Chief Financial Officer; Jamie Privuznak, Budget Director; Scott Hernandez, Information Technology Director; Jeff Catoe, Public Works Director; Clay Catoe, Emergency Medical Services Director; the press; various elected officials; various Department Heads; various employees; and citizens.

A quorum of Lancaster County Council was present for the meeting. The following press were notified of the meeting by e-mail in accordance with the Freedom of Information Act: *The Lancaster News*, *Kershaw News Era*, *The Rock Hill Herald*, Cable News 2, Channel 9 and the local government channel. The agenda was posted in the lobby of the County Administration Building and also on the County website the required length of time. The PowerPoint presentation utilized during the meeting is attached to the written minutes in the Clerk to Council's office.

Call to Order Workshop Retreat - Chairman Brian Carnes
Chairman Brian Carnes called the Workshop Retreat to order at approximately 8:43 a.m.

Approval of the Agenda
Charlene McGriff moved to approve the agenda. Seconded by Jose Luis. The motion Passed by a vote of 6-0; Absent: Billy Mosteller.

Citizens Comments
The following citizens signed up for and spoke during the Citizen Comments: None.
The following citizens submitted electronic, written comments for Citizen Comments: None.

Discussion and Action Items

a. Council Direction: Policy Priorities and Next Actions - *Steve Willis / Sabrena Harris*

This agenda item was moved and combined with agenda item **4l.** since the two items were similar in nature.

b. Where We Are Today: Transportation & Mobility Update - *Jeff Catoe / Tim Greene*

Jeff Catoe provided a transportation update and highlighted the South Carolina Department of Transportation (SCDOT) projects. Council and staff discussed updating the roads project lists on the County's website, and the need for setting up meetings with SCDOT for occasional updates. Stuart Graham questioned who the SCDOT contact is for citizens to reach out to and also requested that the County look into creating a comprehensive plan for roads. Council discussed light synchronization, traffic on Highway 521, a traffic coordination consultant, and traffic impact analysis (TIA) study requirements.

Tim Greene provided a status update via the County's PowerPoint presentation regarding the South Carolina Infrastructure Bank Rural Project Program grant the County applied for in June of 2025 for the widening of Highway 521 and noted that staff hoped to hear back from the State in the spring or summer of 2026. Charlene McGriff explained that Council needed options on how to address the traffic issues on Highway 521 if the grant was not awarded.

c. Planning Forward: Preparing for Growth Through 2050 - *Allison Hardin / Brian Fulk / Chris Clouden / Stephany Snowden*

Allison Hardin highlighted the County's new interactive GIS map and briefly explained how to use it. Council and staff discussed how the population counts were determined and potentially showing proposed and approved subdivisions on the map.

Brian Fulk provided an Economic Development update via the County's PowerPoint presentation, and highlighted property tax revenues, population growth and projections, expanding industry, and potential land development opportunities. The PowerPoint presentation reviewed was different than the one included in the agenda packet. The updated presentation is attached as Schedule A to the minutes. Amy Carnes provided a handout to each Council member entitled, "2025 Economic and Social Impact Analysis" and that handout is attached as Schedule B to the written minutes. Bryant Neal requested that staff provide Council with a monthly update on Economic Development initiatives, projects and when potential industries show interest in County sites. Council and staff discussed what industries had located into the County over the last few years, what the top industries in the State are, how the County can work towards attracting more industrial growth, and the need to lead with job growth and creation rather than leading with residential growth.

Council took a break from the workshop at approximately 11:10 a.m. and resumed at approximately 11:17 a.m.

Chris Clouden provided an overview of the Parks and Recreation Department via the County's PowerPoint presentation, which highlighted their properties, participation and spectator numbers, facility and land needs, and future opportunities to further the department's programs and services. Council and staff discussed incorporating recreation needs into the Development Agreement discussions and requests. Chris Clouden explained that land acquisition was his top request from Council.

Council took a lunch break at approximately 11:42 a.m. and resumed at approximately 12:08 p.m.

Stephany Snowden provided an overview of County property leases via the County's PowerPoint presentation. Council and staff discussed various convenience sites and leases.

d. *Break*

e. Capital Project Sales Tax: Status & Strategy - *Jamie Privuznak*

Jamie Privuznak provided an update on the Capital Project Sales Tax (CPST) via the County's PowerPoint presentation. Council and staff discussed the Rise Lane and Cleveland Street road improvement projects on the CPST2 Proviso. Charlene McGriff stated that any overages from CPST3 needed to go towards County-needed projects. Steve Harper noted that the County needed to move forward with the $9.6 million widening project for Highway 521 before going to the voters on a new sales tax referendum.

Stephany Snowden reviewed a potential timeline for CPST 4 via the County's PowerPoint presentation. Steve Harper stated that nothing about a potential additional tax needed to be brought forward to the public during the 2026 calendar year. Council and staff discussed the Local Option Sales Tax (LOST) and the need to discuss it more often so that Council and the public would be aware of what is collected and how it is used.

f. *Lunch Break*

This agenda item was skipped since Council took a lunch break during agenda item **4c.**

g. Lancaster County Sheriff's Office Briefing - *Sheriff Barry Faile / Major Matt Shaw*

Sheriff Faile provided an update on the Lancaster County Sheriff's Office via the County's PowerPoint presentation, which highlighted call volume, and growth and service population. Sheriff Faile also highlighted the department's FY27 budget priorities, which included 24/7 medical coverage at the Detention Center, technology improvements, and salary increases. Council and Sheriff Faile discussed flock cameras and their usage by HOA communities.

h. Public Safety Briefing - *Clay Catoe / Karla Knight / Robert Purser / Darren Player / Greg Nicholson*

Clay Catoe provided a legislative update for Emergency Medical Services (EMS) via the County's PowerPoint presentation. Mr. Catoe also discussed needed salary increases for his staff.

Karla Knight Deese provided an update for the Coroner's Office via the County's PowerPoint presentation, which highlighted the department's new building, data, short-term goals, and budget requests for the upcoming fiscal year.

Robert Purser provided an update for the Public Safety Communications department via the County's PowerPoint presentation, which highlighted the department's call data, technology utilized, equipment status, funding, and budget requests for the upcoming fiscal year.

Darren Player provided an update for the Fire Service via the County's PowerPoint presentation, which highlighted the need to increase staffing (24 hour coverage for the Greater Lancaster area), replacement of out-of-date apparatus, growth within the County, and the need for stations, a training facility, and apparatus for new stations. Council and staff discussed apparatus and special tax districts.

Greg Nicholson provided an update for the Indian Land Consolidated Fire District via the County's PowerPoint presentation. A handout was provided to each Council member that provided an overview of the department and future initiatives. A copy of the handout is attached as Schedule C to the minutes. The PowerPoint presentation highlighted the top priorities for the fire district, which included fire station 3, fire engines, and rescue personnel. Council and staff discussed the size needed for fire station 3.

i. *Break*

Council took a break from the workshop at approximately 2:45 p.m. and resumed at approximately 3:04 p.m.

j. Enterprise Resource System (ERP) Update - *Sabrena Harris*

Sabrena Harris provided an update on the Enterprise Resource Planning (ERP) system via the County's PowerPoint presentation. Council and staff discussed how Council would receive budget information from staff in the future, an additional staff member to assist with ERP implementation, the timeline of implementation, uploading historical data into the new system, and how far back it would be uploaded.

k. Forecasting Budgetary Impacts for FY26 / FY27 - *Jamie Privuznak*

Jamie Privuznak reviewed the budget forecast for FY26/27 via the County's PowerPoint presentation. There was no discussion from Council.

l. Council Direction: Strategic Priorities for FY26 / FY27 - *Sabrena Harris*

Sabrena Harris reviewed the strategic priorities for FY26 / FY27 via the County's PowerPoint presentation. Council discussed their priorities, which included (in no particular order) livable wages, infrastructure, quality of life, County organizational culture / employee satisfaction, first responder satisfaction, traffic relief, a comprehensive roads plan, job creation, a comprehensive facilities study, strengthening relationships with other municipalities and the school district, clear and concise documents available to the public, understand budget requests and their justifications, complete the County Administrator search, and complete the Unified Development Ordinance (UDO) rewrite.

Adjournment

Bryant Neal moved to adjourn the workshop retreat. Seconded by Charlene McGriff. Brian Carnes stated that the meeting was adjourned.

There being no further business to discuss, the County Council workshop retreat adjourned at approximately 5:15 p.m.

Respectfully Submitted:

Lauren Hill

Lauren Hill
Deputy Clerk to Council

Approved by Council on February 9, 2026

Bryant Neal

Bryant Neal, Secretary

Schedule A

Lancaster County
South Carolina

2026 County Council Retreat
Proactive Policy Making for 2050

Economic Development
"A case for more industry and more revenues"

Brian Fulk

January 29, 2026

Property Tax Revenues: A Main Source of Future County Revenues

- **Net Property Taxes for Lancaster County for the year ending June 30, 2025 were $63,800,000. This represents, at 66%, the majority of all revenues collected by the County from all sources. Nothing else comes close in terms of a single revenue category being more important to serving the County's needs.**

Importantly, versus most other County revenue sources, the Property Tax revenue line is one category where we can make strategic development decisions today, and over the next nearby years, that will have significantly positive medium-term and distant future outcomes.



A Strategic Policy Question

Lancaster County
South Carolina

How do we best address the strong demand for more residential housing, and the County's servicing expenses associated with these new and existing residential properties, while also placing additional team focus, and County financial resources, towards expanding the County's industrial/commercial property tax revenue base; giving these businesses time to start making an important offsetting positive financial impact to the negative financial yield of residential property for the County?

Economic Facts To Boast About!

- Lancaster County's GDP exceeded **$4.7 billion** for the first time. At the current GDP level, **Lancaster ranks 17th of South Carolina's 46 counties.**
- The median household income in Lancaster County continues to grow, and is now at **$74,000**, over 50% higher than the state median of $48,000.



And we are very proud of this!

- Good schools...good teachers with modern facilities.
- Safe Environment.
- Public recreational facilities for all ages.
- Golf, Tennis, Pickleball, Biking, Walking, Swimming, Horseback Riding, Sporting Clays, and more are available in the area.
- Cultural activities.
- Classes in dance, cooking, art and more.
- Community events throughout.
- Improving an already **Good Quality of Life.**



Population Growth

Lancaster County
South Carolina

Annualized Population Growth Estimates for Selected S.C. Regions

Source: U.S. Census Bureau & SC Office of Revenue & Fiscal Affairs Projected

Region	Annualized Pop. Growth (2010-2023)	Annualized Pop. Growth (2023-2040)
Chester County	-0.3%	-0.2%
Chesterfield County	-0.6%	-1.1%
Fairfield County	-1.3%	-2.5%
Kershaw County	+0.8%	+0.7%
Lancaster County	+2.6%	+2.3%
York County	+2.2%	+1.9%
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South Carolina	**+1.1%**	**+1.0%**

Population and Projections to 2050*

Lancaster County
South Carolina

- 2020 Census: 96,011 residents
- 2025 Current Estimate: 111,652 residents
- 2035 Projection: ~128,294 residents
- **2050 Projection: ~192,275 residents**.

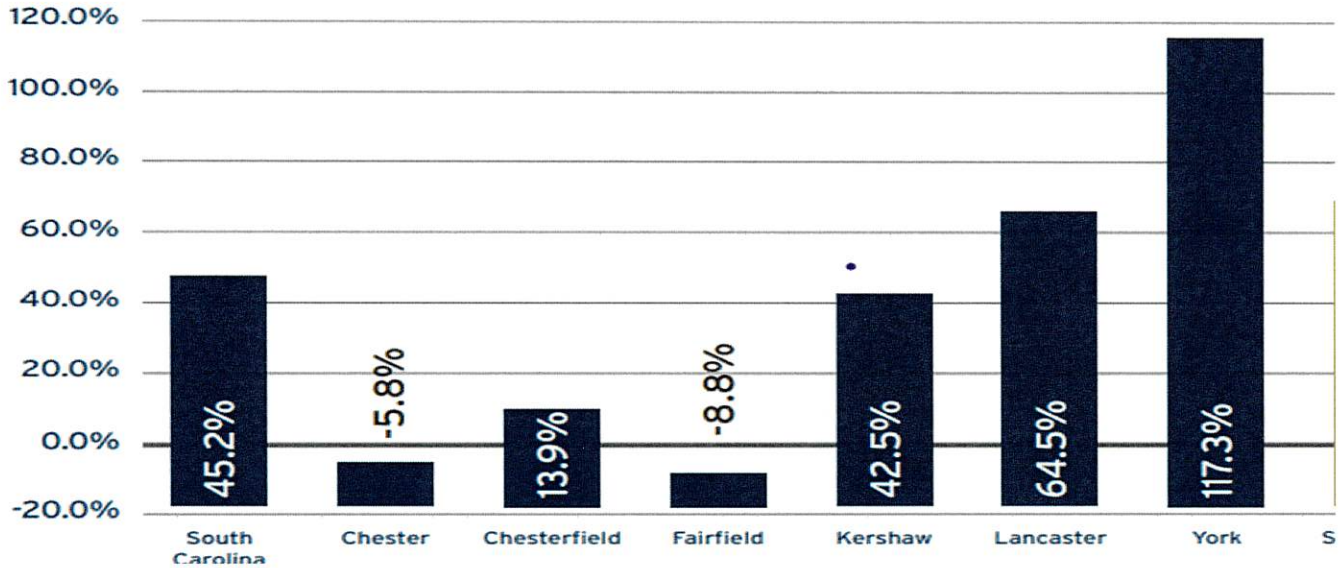
*Projections assume no residential development moratorium

Good News! Employment Growth Has Been Strong

Lancaster County
South Carolina

Figure 2 **Cumulative Employment Growth, 1990-2024**

Source: U.S. Bureau of Labor Statistics, LAUS, September 2024



County Assets—Why is everybody coming here?

Lancaster County
South Carolina

- Proximity to a large growing metro
- Proximity to an international airport
- Good road, highway and rail transportation systems
- Good public and private schools in the region
- Safe environment
- Lower property taxes for most inbound residential population
- Ample talented workforce
- Workforce training
- Lower average wages
- Lower cost of operating a business
- Quality of Life
- And More!









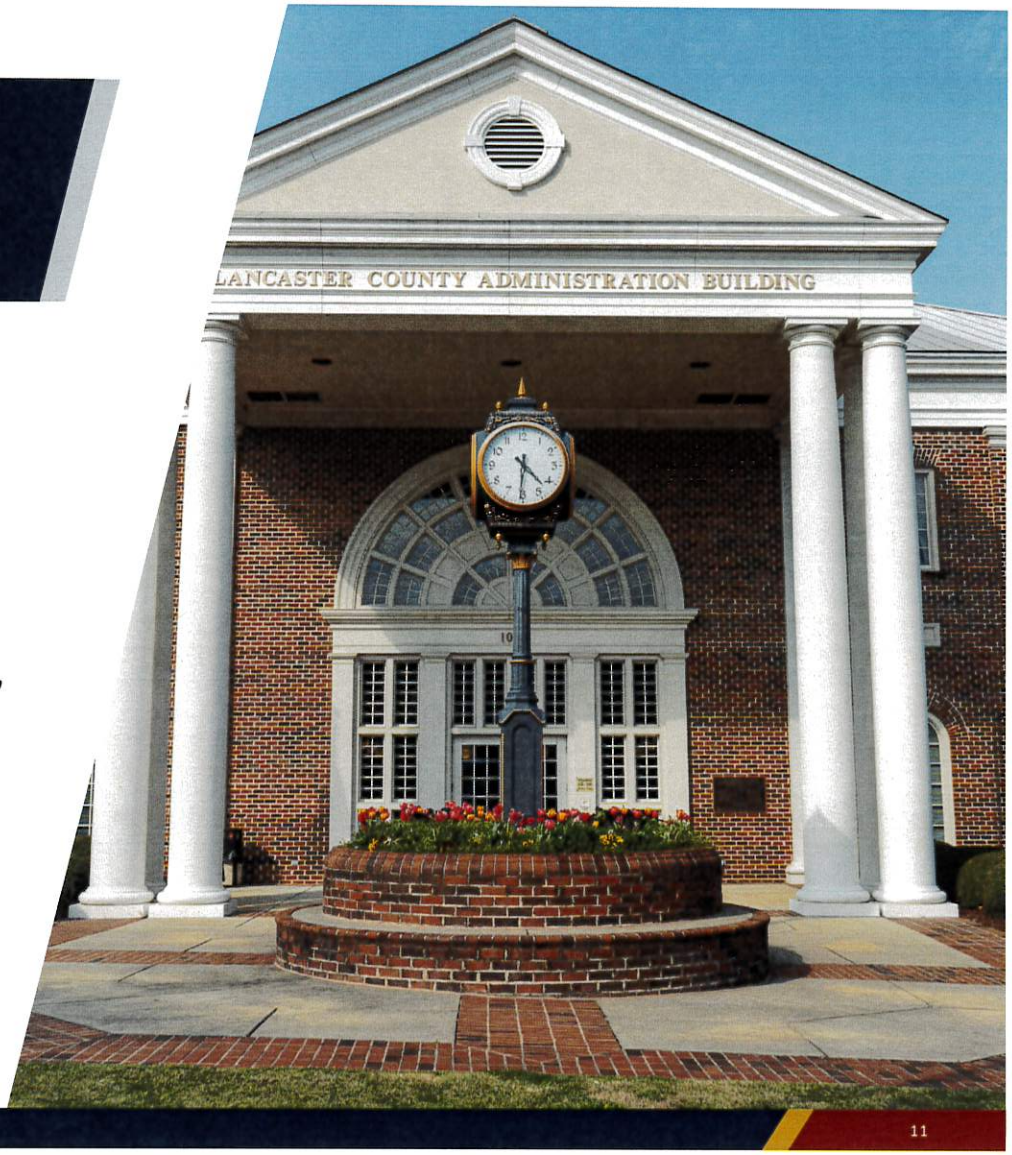
Lancaster County Vision

***Lancaster County will be a* network of thriving communities offering the highest quality of life in the Carolinas.**



Lancaster County Mission

Our Mission is to enhance our community's quality of life by enabling people to live, learn, work, worship, play, and grow – both personally and professionally.



Lancaster County Mission... Digging Deeper

Lancaster County is a people-friendly and safe location, welcoming families, singles, young and older adults, students, employed and retired individuals, **and offering a variety of residential housing options,** with excellent access to state-of-the-art routine and emergency healthcare; **along with right-fitting businesses, appropriately located, to provide sustainable higher-paying jobs and, especially, to provide the core funding for the services that residents, tourists, visitors, workers and others need within the County well into the future.**



Two Paths Counties May Take: *Residential Growth*

Lancaster County
South Carolina

Residential growth, in attractive areas, almost seems to occur naturally, and without much encouragement required. Especially in rural and suburban counties, like Lancaster County, located nearby a rapidly growing large metropolitan area, rapid residential growth is the normal development route seen all across the USA.

What Happens In A Typical County With High Residential Growth?

Lancaster County
South Carolina

- **Rapid housing approvals**, often stretching staff.
- Schools, roads, EMS, Fire, and Law Enforcement **services must expand**.
- **Revenues** from new residential developments **lag behind the county's expenses, and equipment investments,** for the services needed.
- Left unchecked, without property tax revenue-producing businesses growing alongside the residential expansion, a high residency growth scenario will likely lead to eventual **residential tax increases, or perhaps the need to borrow funds to pay for current and future ongoing needs.**







Residential Growth: Typical County Concerns

Lancaster County
South Carolina

- Every new rooftop brings new residents, requiring law enforcement, fire protection, road maintenance and other services largely provided by the county.
- Property tax revenues from an average single-family home fail to cover the cost of the above county-provided services.
- With mostly residential growth in any county, future property tax burdens on residents are likely to increase, or cause less county services to be available. For Lancaster County, this residential growth, without a source of other revenue funding, will negatively impact our high quality of life Vision.

Residential Growth: The *Fiscal Reality*

Lancaster County
South Carolina

- $1 in **residential property tax revenues** compares to a typical county's service expenses of **$1.10 – $1.40** (and this does not include school expenses).
  - *A typical county in the USA will incur expenses to provide services to residential areas up to 40% more than the county takes in from the residential property tax payments, assuming no compensating impact fees or tax adjustments.*

The Cost of Residential Growth: Bringing Schools into the Equation

Lancaster County
South Carolina

In the 2025-2026 fiscal year, the average funding cost per K-12 student in Lancaster was **$15,075.**

In South Carolina, owner-occupied residential homes are exempt from paying any property taxes covering school operating expenses. Homeowners pay $0.00 in property taxes for school operating expenses.

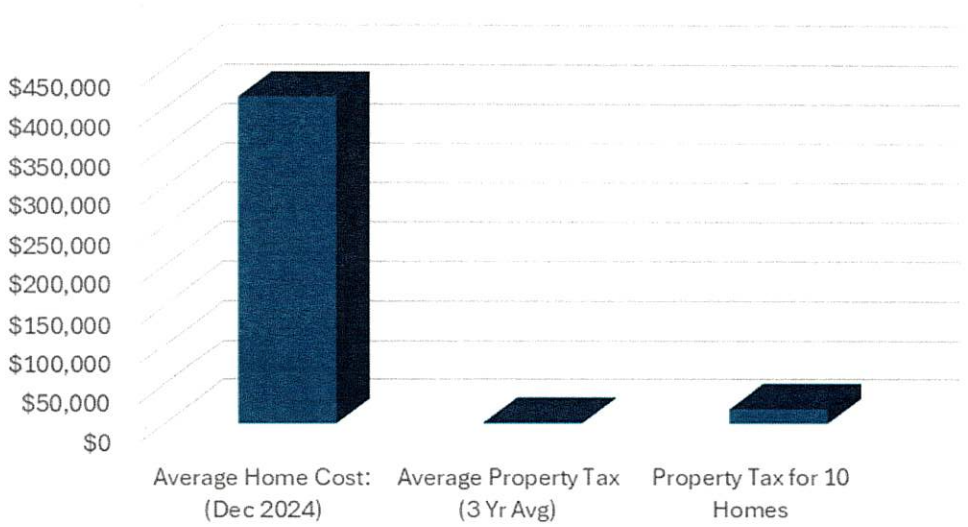
Residential vs Industrial Tax Yield

Lancaster County
South Carolina

- **Residential Yield:**
  - A typical owner-occupied home in Lancaster pays annual property taxes of **under $2000.00**, leaving a substantial deficit (even without school cost considerations) versus the cost of the numerous services provided by the County. This deficit (excess of service cost to the County vs residential property tax revenue received) must be made-up by other revenue sources. With one home per acre on 10 acres, this hypothetical residential development would generate property tax revenues of just under **$20,000** per annum in property taxes collected by the County.
- **Industrial/Commercial Yield:**
  - An industrial property, also on 10 acres, valued at $25,000,000, contributes roughly **$200,000 to $225,000** annually in property taxes *(depending on FILOT/SSRC agreements that might reduce this)*. The Industrial Tax Yield is as much as 10 times that of a residential equivalent, with much less use of County Services.

Housing-Property Taxes

- Average Home Price *(Dec 2024)*: $415,267
- Average Home Assessed Value: $298,100
- Average Property Tax *(3 Yr Avg)*: $1859.62
- **Property Taxes for 10 Homes for 1 Year: $18,596.20**



Two Paths Counties May Take: *Expanding Industry*

Lancaster County
South Carolina

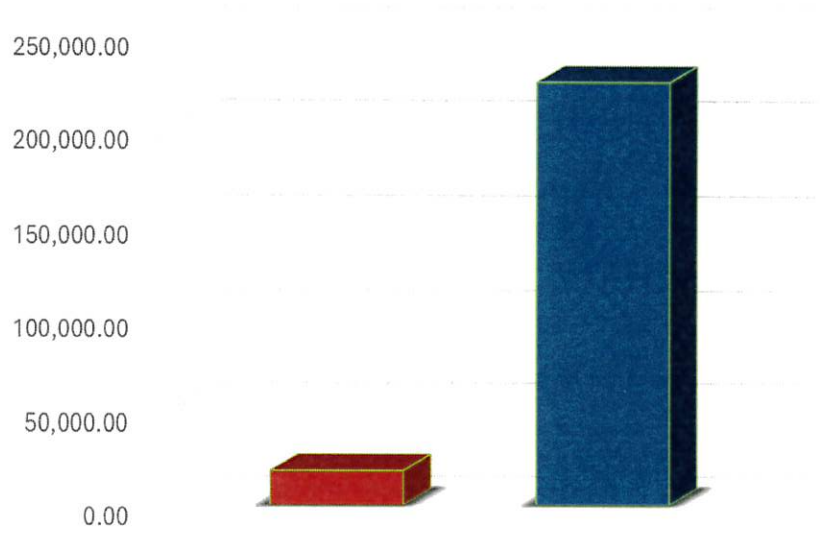
Today, with more than 3000 other counties competing in the USA for investments, today's industrial projects require and demand extensive site preparation creating a site deemed "build-ready" *(surveys, environmental studies, land clearing, land grading, and infrastructure all completed)*.

Most new projects want to build as soon as possible, and cannot wait for grading and infrastructure.

Industrial Property Taxes

Lancaster County
South Carolina

- 50,000 sq ft. Building on 10 Acres w/ $25 Million Investment.
- 6% tax rate and Millage 345.5 mills.
- **Estimated Annual Industrial Property Taxes: $225,000**



A Focus on Expanding Industry: A Clear Fiscal Advantage

Lancaster County
South Carolina

- $1 in industrial taxes paid costs only ~$0.30 in services.
- Industry and Commercial property taxes produce significant surplus funds, equal to approximately **$0.70 cents per $1** in revenues collected.

Ideal "TEXTBOOK" 1-2-3 County Sequencing

Lancaster County
South Carolina

1. **Invest in land preparation (and, with partners, infrastructure) to attract and create an industrial and commercial property tax revenue base.**
2. **Residential developments come next, to allow people to move nearer to new employment opportunities.** Most people prefer to live and work in the same area without having a long commute.
3. **Retail and consumer services follow jobs and residential growth.** These follow-on retail businesses and services also create good jobs, with a wide range of wages. The retail component also provides much-desired sales tax revenue as well (Costco and Target will be good examples to watch).

Results of Ideal Sequencing for a Typical County

Lancaster County
South Carolina

- Adds early strength and stability to the property tax base.
- Funding for future schools becomes largely provided by businesses.
- Helps with the important goal of increasing jobs within the county for our residents and others.
- Creates an local ecosystem where "lunch money expenditures," and lunchtime and early evening purchases, occur in the county.
- Reduces commuter traffic leaving the county, making roads a bit safer.
- A strong future county financial position is virtually assured.

Bottom Line Recommendation: Let's Galvanize Our Industrial Growth Strategy

Lancaster County South Carolina

- **Make** near-term site improvement investments in existing County-owned industrial properties in order to attract new industry, and thereby providing tax revenues and employment.
- **Strengthen** the business property tax base with new onboarded employers.
- **"Guide"** housing to follow new jobs.

The ideal sequence, ***not always possible***, creates **financially-balanced communities** with a **steadily growing** and **dependable tax base**, assuming a diversified range of businesses.

County-owned Industrial Assets

Lancaster County
South Carolina

1. **Lancaster County Airport**
2. **Lancaster County Air Rail Business Park**
3. **Lancaster County Business Park**
4. **Heath Springs Business Park**





The Catawba River



This Photo by Unknown Author is licensed under CC BY-ND

Is Water, Water, Everywhere?

Lancaster County
South Carolina

- Our drinking water (tap water) source is the Catawba River.
- The Catawba River, including sections in Lancaster, has faced significant endangerment due **mainly to polluted runoff; a consequence of residential development stormwater and agricultural runoff**, leading to it being named as one of the state's endangered rivers.
- A restriction we operate under now in Lancaster is that the maximum additional wastewater capacity for the entire County area served by LCWSD is 1 million gallons a day. The City of Lancaster and some towns (Heath Springs and Kershaw as examples) in the County have a greater supply, either by way of contracts with LCWSD, or being served by another provider.
- **Lancaster's wastewater capacity limit has impacted, and will impact, some industrial growth opportunities.** To maneuver around this, we have focused on, and will continue to focus on, recruiting new operations that are not viewed as wastewater intensive.

"That's Life!" Let's deal with it and move forward

Lancaster County
South Carolina

- **Lancaster County does not own or control the utilities it depends upon.** This will sometimes result in a disconnect between the needs of a county-wide industrial growth focus, and the ability to service those areas by our utility providers. **Utilities typically follow new industrial projects rather than anticipate areas of growth and proactively add capacity.** It's an understandably safer financial strategy for them. However, from our side, with a two-year buildout for a new large project needing high electricity capacity, or larger wastewater capacity, almost all such investors look elsewhere for assets ready to build upon immediately.
- **Presently, Duke Energy has an additional 7-10MW of electricity capacity** for most of Lancaster County, enough to power several 50,000 sq ft manufacturing facilities. On the other hand, as a comparison, a Data Center would need 300 MW at full capacity.
- **We are a Tier II *("Moderately Developed")* County** along with: Aiken, Anderson, Calhoun, Edgefield, Georgetown, Jasper, Newberry, Pickens, Richland and Saluda. Chester County is a Tier III and York County is a Tier I. **Companies locating to Lancaster County can only receive SC State Job Tax Credits of $2,750** per job versus a Tier III County (Chester County) at $20,250.
- Recent studies show **more than 50% of the workforce living in Lancaster County, work outside the County.** These 25,000+ commuters are spending some of their disposable money elsewhere, otherwise known as "financial leakage." The County loses some revenue here that could be used to offset future taxes, or help with existing county expenses. And keeping money circulating in the County has a positive multiplier impact.

Summary For Consideration

Lancaster County
South Carolina

- The County would benefit from having significantly more industrial and office employers in Lancaster, as these businesses will contribute to the costs for the County services needed by residents. Also, more jobs in the County may help reduce the significant outbound commuter traffic now occurring.
- According to the field of knowledge available on Economic Development, we need to focus on and deal with what we can control as to our industrial county-owned assets. In the modern and rapidly changing world we now live in, this means **having most of our sites "ready to build upon."** We should also try and expand the pace to improve the land we own, which is already designated for industry development.
- And, between right now and the next few years, we will want to consider acquiring more industrial land (or other land to be designated for industry), **even if there are no immediate plans or funding to develop.** Availability of suitable property will continue to shrink and land prices will rise. More on a later slide.
- Allow or encouraging certain properties to be rezoned to Light or Heavy Industrial without a change in taxes for the current owner.
- Today we have 7% of the entire county public and privately-owned acreage devoted to industry, suggesting that there is physical room for growth.

Improvement Estimates For Consideration

Lancaster County
South Carolina

- **Heath Springs Business Park:** Land clearing, grading, and the paved road to cost an estimated **$2.0MM**
- **Air Rail Park:** Clearing and Grading of Lot 7, approximately 29 acres in total with 15 plus developable. Est. **$2.0MM**
- **Air Rail Park:** Extend the road into and possibly beyond lots 4 and 5 (awaiting an industry to locate here on our ready 20-acre site). **Est $1.5MM**
- **Air Rail Park:** Site work at Lot 3, 10 acres, to make it build-ready for a 50K sq.ft structure**. Est. $1.5MM**

Why More Land?

Lancaster County
South Carolina

- The available land, zoned LI or HI, is limited in the County.
- The textbook problem with housing locating nearby an area zoned for industry, even if such zoning has been in place for decades, is residents will object to a nearby industrial facility...and even if the original intention was for the industrial site to be the focus and the priority. Residential growth near unimproved (and improved) industrial sites can slow, or stop, much needed future industrial and commercial growth.
- Owning land, possibly otherwise at risk and eventually destined to be rezoned from Industrial to Residential, will keep a County-controlled placeholder for industry to locate. In these areas, we can also better control which companies are "right-fitting" to locate here.
- Twenty-five years from now, the then leaders of Lancaster County will be appreciative of the foresight taken in the next few years to better prepare and build the financial engines to fund and reach our Vision.

Why More Land?

Lancaster County
South Carolina

There is no privately-held industrial property of any significant size in Lancaster County that is build-ready, other than land now attached to existing operations. We have people looking for 10 acres of industrial land and cannot find it.

There is no county-owned land south of the City of Lancaster that is build-ready. Thus, our current focus on making a site ready at the Heath Springs Business Park. Comporium recently contributed $165,000 to help us with this project.

We have only one site at the Air-Rail Park that is "build-ready." The site is zoned Light Industrial, which some argue is incongruent with being adjacent to the L&C Railroad. Rail here is used substantially by Heavy Industrial users located outside Lancaster.

The existing expansions we are seeing with local companies are largely on sites they now operate on. This works for the first expansion. **But, where do our existing companies go next when they desire to expand again?**

Possible Land to Analyze

Lancaster County
South Carolina

- **Airport**
  - *Future Hanger Needs?*
- **Fosters Crossroads Industrial Site**
  - *This is the land now zoned HI. The acreage size in total is over 1000 acres, but smaller tracts are possible (350 acres as a target?). To our knowledge, there has never been any environmental and related studies performed on this property, and that would likely need to be done at our expense.*
- **Land across the railroad track at the Air Rail Park**
  - *This property would be more attractive to a new industrial investor if it can be designated as a HI property, or a "LI plus" property. Rail here is very valuable asset, but rail and natural gas are more consistent with heavy industry usage. This land has not been evaluated with preliminary environmental and related studies.*
- **Other properties**

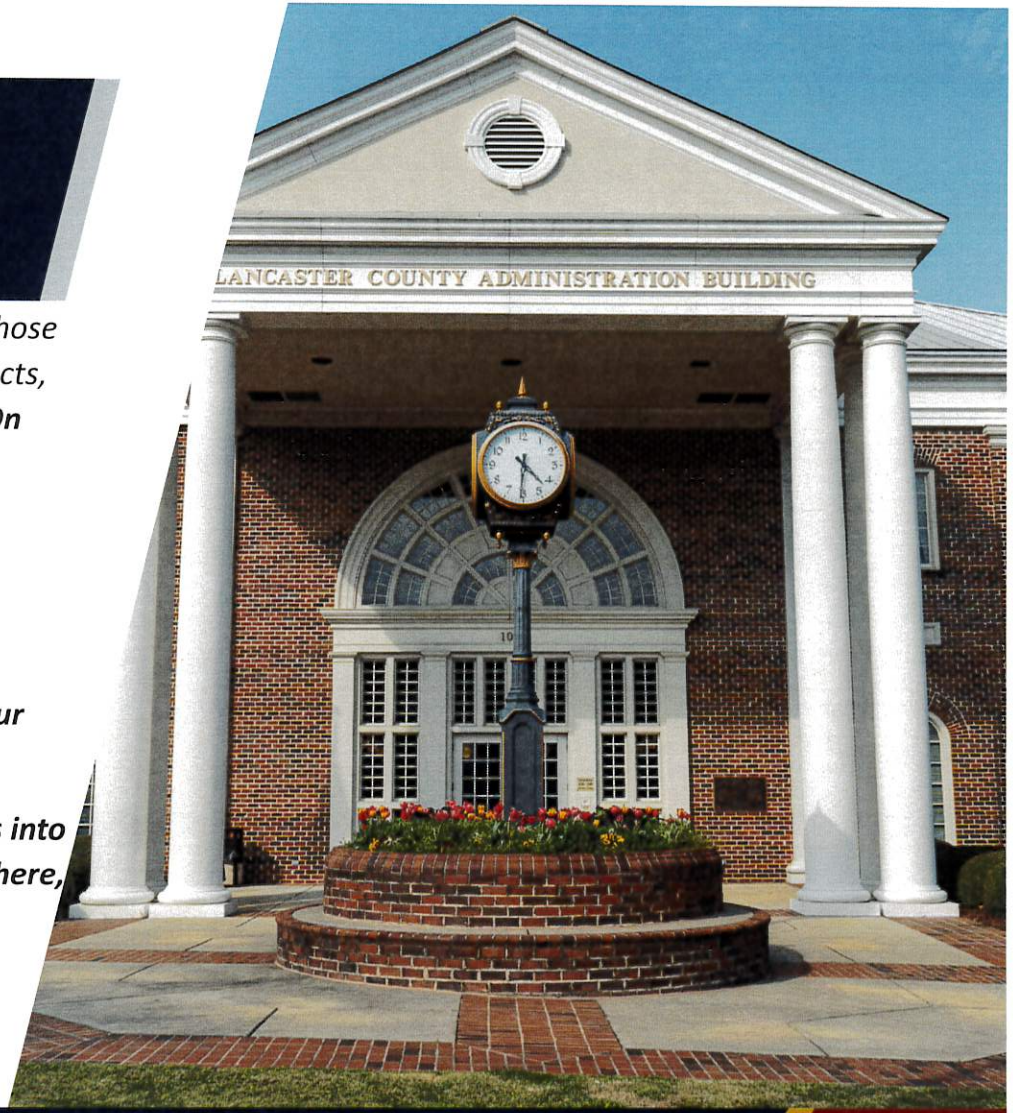
Becoming "One Lancaster County"

For the Vision and Mission to be realized, County employees, *especially those engaging directly with a business customer, or a customer's business projects,* ***will want to support the need and current efforts to recruit, and bring "On Board" property tax revenue-producing industrial and commercial properties.***

These businesses, both large and small, will provide significant future property tax funding for the County, allowing the County to continue to provide and further expand the services needed, and desired, by our residents. Excess funds can be used for improving the quality of life for our citizens.

These businesses will also bring much needed employment opportunities into the County. And, if history is any indication, once new companies locate here, they tend to expand here.

More County revenues will also benefit County employees, the County's most important asset.



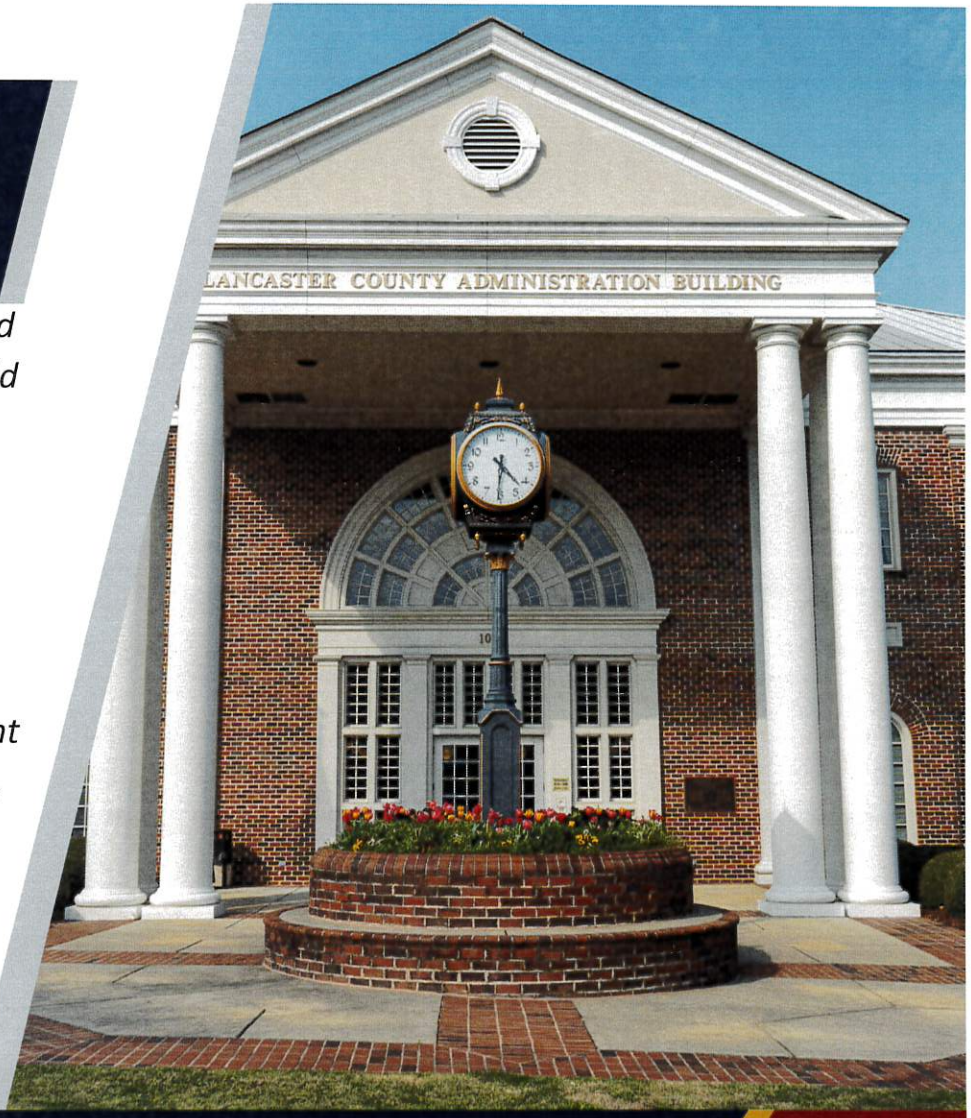
Determine the Key Goals for the "One Lancaster County" Team

1) Provide *the expected County government emergency, support and other services that citizens need, if not more, and "do it as you would want" to have such experience.*

2) Contribute *to and support business growth in order to remain financially healthy and sound today, and in the future; all without placing a heavy tax burden on owner-occupied residential property taxpayers.*

3) Help *Lancaster County and its Economic Development Department attract new investments and create new employment opportunities, with higher paying wages, for citizens residing in the County.*

4) Keep *the County clean from liter and blight, and work to create our vision...citizens enjoying* ***"the highest quality of life in the Carolinas."***



A Strategic Policy Question

Lancaster County
South Carolina

How do we best address the strong demand for more residential housing, and the County's servicing expenses associated with these new and existing residential properties, while also placing additional team focus, and County financial resources, towards expanding the County's industrial/commercial property tax revenue base; giving these businesses time to start making an important offsetting positive financial impact to the negative financial yield of residential property for the County?

Questions/Guidance?

Lancaster County South Carolina

Discussion

Brian Fulk, Lancaster County Economic Development Director

bfulk@lancastercountysc.gov

Schedule B

2025 Economic and Social Impact Analysis



OCEANAGOLD

HAILE GOLD MINE

COMMISSIONED BY:

OCEANAGOLD
HAILE GOLD MINE

PREPARED BY:

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January 2025

UNIVERSITY OF
South Carolina
Darla Moore School of Business

Executive Summary

The Haile Gold Mine, located in Lancaster, South Carolina, has been one of the longest lasting and highest producing gold mines in the eastern United States since its formation in 1827. Although production and operations at the mine ended in 1992, in 2007 Romarco Minerals acquired the mine and started the processes of exploration and permitting so that it could eventually be reopened. In 2015, OceanaGold Corporation purchased the Haile Gold Mine in order to re-establish operations using new state-of-the-art technology and mining techniques. After an approximately 27-month construction period, the mine was officially reopened in October 2017. The current active production phase is projected to extend through the year 2037.

OceanaGold anticipates that the Haile Gold Mine will be able to successfully extract up to 4 million ounces of gold, during which time the mine's operations will support a sizable economic impact with accompanying job and income gains for Lancaster County residents and residents in the surrounding region. The purpose of this study is to estimate the total economic impact of the Haile Gold Mine on Lancaster County, the surrounding three- and six-county regions, and the state of South Carolina as a whole.

The key findings of this study are as follows:

- *The total current annual economic impact of the Haile Gold Mine on the county of Lancaster is estimated to be $568.7 million. This figure reflects the dollar value representing all final goods and services produced in Lancaster County that can be attributed (either directly or indirectly) to the mine's operations. This impact corresponds to 1,177 jobs and $106.3 million in labor income that would not exist otherwise.*

- *When expanding the area of analysis to include the surrounding six-county region (Lancaster, Chester, Chesterfield, Fairfield, Kershaw and York counties), the economic impact of the Haile Gold Mine increases to $634.0 million annually – which is associated with 1,413 jobs and $117.8 million in labor income.*

- *Statewide, the Haile Gold Mine's current total annual economic impact is estimated to be $717.5 million. This implies that the mine generates economic activity (directly and indirectly) that brings in about $16.4 million in tax revenue annually for the state of South Carolina.*

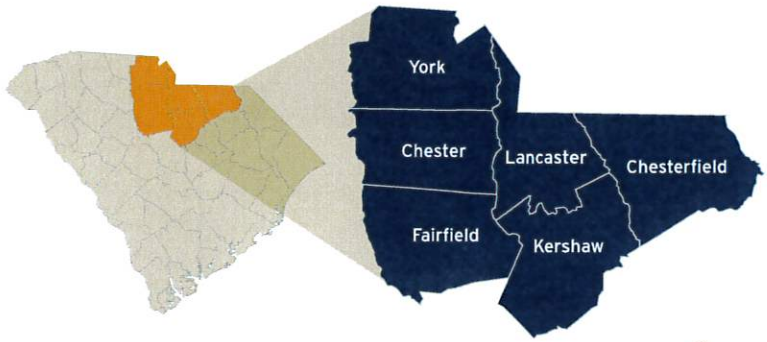
- *Based on current projections, the current active production phase of the Haile Gold Mine will continue through the year 2037. This implies that the cumulative economic impact of the Haile Gold Mine on South Carolina will total more than $9.3 billion by the year 2037.*

- *In recent years, the bulk of South Carolina's economic activity has primarily come from its major metropolitan regions, while more rural areas of the state have often experienced either stagnant or declining growth rates. As such, the economic benefits generated by the Haile Gold Mine through employment opportunities and higher incomes for local residents in the surrounding communities cannot be overstated.*

- *The average annual wage of employees at the Haile Gold Mine is approximately $86,485. This represents a significant wage premium over most other major industries in the surrounding region and implies that the Haile Gold Mine is highly competitive for local workers.*

- *The Haile Gold Mine's ability to provide job opportunities for individuals in rural counties is helping to both mitigate the economic struggles associated with population decline as well as helping to retain local talent, which can also serve to boost long-run community development.*

Six-County Regional Dashboard





Measure	South Carolina	Chester County	Chesterfield County	Fairfield County	Kershaw County	Lancaster County	York County
POPULATION							
Annual Growth (2010-2023)	+1.1%	-0.3%	-0.6%	-1.3%	+0.8%	+2.6%	+2.2%
Annual Growth (2023-2040)	+1.0%	-0.2%	-1.1%	-2.5%	+0.7%	+2.3%	+1.9%
EMPLOYMENT							
Cumulative Growth (1990-2024)	+45.2%	-5.8%	+13.9%	-8.8%	+42.5%	+64.5%	+117.3%
INDUSTRY RANK BY EMPLOYMENT SIZE AND ACCOMPANYING AVG. WAGE							
Industry Rank: 1	Health Care & Social Asst. ($63,948)	Manuf. ($66,228)	Manuf. ($66,804)	Manuf. ($64,464)	Retail Trade ($32,124)	Health Care & Social Asst. ($56,628)	Accom. & Food Service ($24,060)
Industry Rank: 2	Manuf. ($75,660)	Wholesale Trade ($87,864)	Health Care & Social Asst. ($44,100)	Utilities ($121,200)	Manuf. ($70,260)	Retail Trade ($36,060)	Retail Trade ($37,872)
Industry Rank: 3	Retail Trade ($39,660)	Retail Trade ($29,028)	Transp. & Warehousing ($43,032)	Education (N/A)	Health Care & Social Asst. ($61,944)	Manuf. ($66,228)	Health Care & Social Asst. ($56,556)
Industry Rank: 4	Education (N/A)	Public Administration ($38,400)	Education (N/A)	Health Care & Social Asst. ($40,968)	Accom. & Food Service ($22,272)	Education (N/A)	Manuf. ($76,596)
Industry Rank: 5	Accom. & Food Service ($26,760)	Construction ($78,348)	Retail Trade ($33,360)	Retail Trade ($40,464)	Education (N/A)	Accom. & Food Service ($23,280)	Education (N/A)
AGE							
Median Age of Population	40.0	41.8	42.6	46.6	40.6	42.2	39.2
EDUCATIONAL ATTAINMENT							
Less than High School	10.7%	14.8%	18.6%	15.9%	11.1%	10.9%	7.7%
High School Graduate (or Equivalent)	28.5%	41.4%	40.1%	39.6%	34.2%	28.2%	24.0%
Some College or Associate's Degree	30.2%	30.0%	28.4%	29.8%	33.4%	30.7%	31.4%
Bachelor's Degree or Higher	30.6%	13.9%	12.9%	14.7%	21.3%	30.1%	36.9%
INCOME							
Median Household Income	$63,623	$50,022	$46,326	$44,521	$61,343	$72,186	$80,158
DISTRIBUTION OF HOUSING UNITS							
Owner-Occupied	60.7%	68.1%	60.0%	70.6%	70.6%	74.6%	68.7%
Renter-Occupied	24.9%	19.9%	23.2%	20.0%	15.7%	16.9%	25.8%
Vacant	14.4%	12.0%	16.8%	19.6%	13.6%	8.5%	5.5%
HOUSING PRICES							
Median Home Value for Owner-Occupied Units	$216,200	$133,600	$91,400	$123,200	$173,800	$272,100	$287,600
COST OF LIVING							
Cost-of-Living Index	100	94.4	90.6	95.3	96.1	99.6	106.7

Section I

Introduction

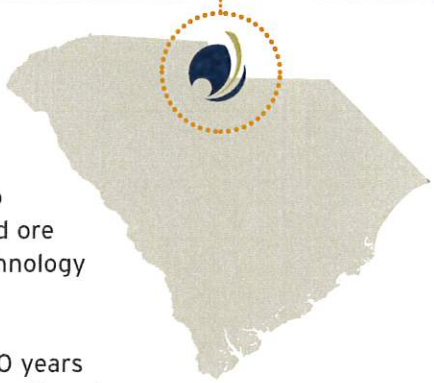
Though many associate the origins of gold mining in the United States with California in the year 1849, the gold mining industry in the United States can actually be traced to the Southeast, where in 1799 the first U.S. gold deposits were discovered in North Carolina. This first discovery led to what is now known as the Carolina gold rush, a period during the early 1800s in which workers migrated en masse to North Carolina (and surrounding areas) to unearth these previously untapped resources. During this time period Benjamin Haile, a South Carolina plantation owner who was caught up in gold rush fever, discovered gold deposits in a stream on his land in Lancaster County.

Although, at first, he mined this gold with picks and shovels, it eventually became evident that his discovery represented a significant gold deposit as he mined larger and larger volumes of gold over time. Haile and his family mined this gold deposit from 1827 until 1858. Following the Civil War, an effort to reopen the mine began in 1867 and a small amount of gold was produced in 1870. Then after sitting idle from 1873 to 1880, the mine was acquired by a New York firm and officially became the Haile Gold Mine.



The Haile Gold Mine was operated intermittently throughout the 20th century until 1999, making the Haile Gold Mine one of the longest lasting and highest producing gold mines in the eastern United States. It is estimated that more than 350,000 ounces of gold were produced from the Haile Gold Mine between 1827 and 1999.



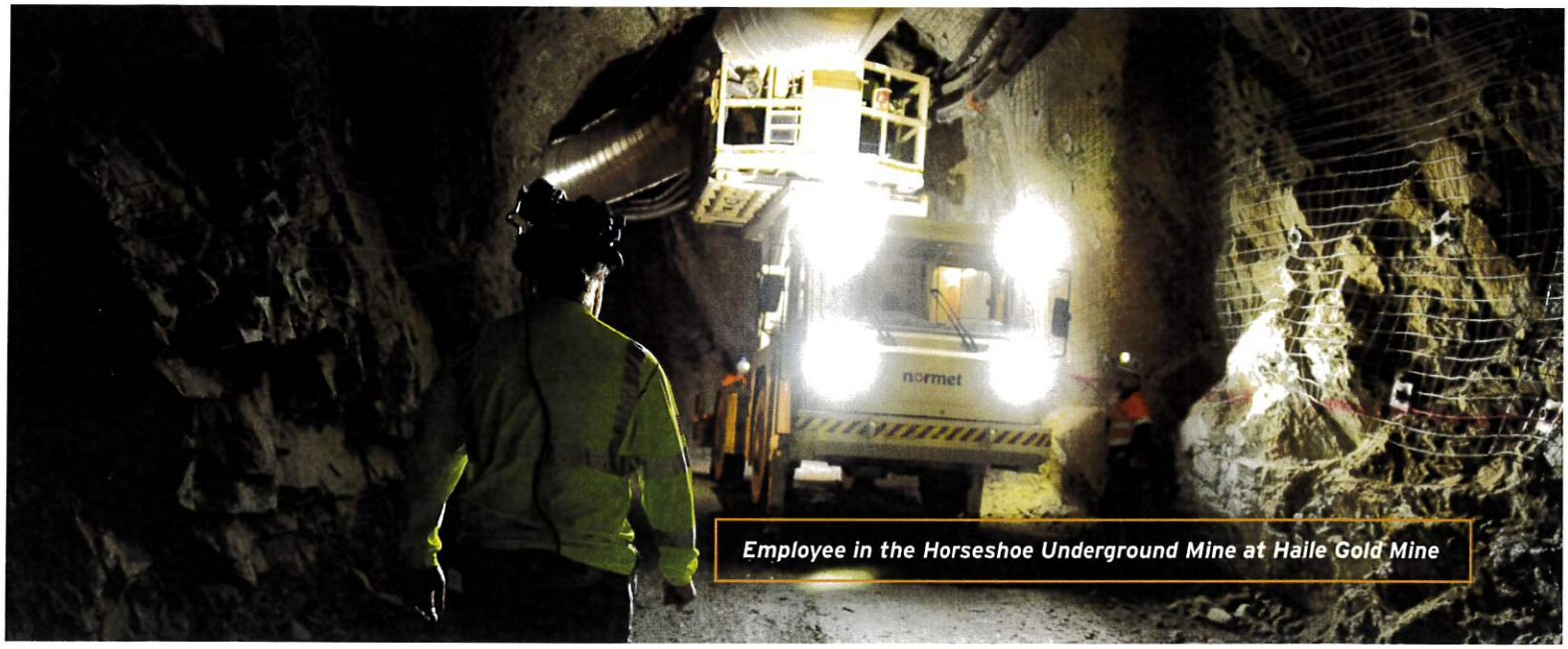


In 2007, the Haile Gold Mine was acquired by Romarco Minerals and the processes of exploration and permitting were begun to reopen the mine once again. Romarco Minerals was later purchased by OceanaGold Corporation in July 2015. Exploration efforts on the part of both Romarco and OceanaGold over the past decade have indicated that substantial gold ore deposits currently exist that can be mined using new state-of-the-art technology and modern mining techniques.

As a significant multinational gold and copper producer with more than 30 years of experience, OceanaGold spent approximately two years after purchasing the mine constructing a new Haile operation that incorporates these new technologies into the mining process. Commercial production at the Haile Gold Mine began in October 2017, and OceanaGold anticipates that the mine will be able to successfully extract up to 4 million total ounces of gold over its lifespan.

The Haile Gold Mine is located in Lancaster County, South Carolina, approximately 17 miles southeast of the city of Lancaster and 30 miles south of Charlotte, North Carolina. The Haile property is comprised of over 10,000 acres, which includes the approximately 4,600-acre mine site. The processes of exploration, permitting, and operations of the Haile Gold Mine outlined above have provided a significant economic boost to the local region over the last decade and have helped to stimulate not only Lancaster County's economy, but also the surrounding areas – including Chester, Chesterfield, Fairfield, Kershaw, and York counties.

As South Carolina has continued to experience solid economic growth in the aftermath of the 2020 Pandemic, this six-county region of the state – and most notably Lancaster County – has grown at a faster pace by comparison, currently averaging an annual employment growth rate of 2.2 percent since 2020 (compared to 2.1% for South Carolina as a whole).



Employee in the Horseshoe Underground Mine at Haile Gold Mine

As of 2024, the Haile Gold Mine is estimated to generate an annual economic impact of more than $568.7 million in Lancaster County alone. In addition, nearly 1,200 jobs in Lancaster County are supported, either directly or through economic multiplier effects, to the Haile Gold Mine.

Based on current projections, the current active production phase of the Haile Gold Mine that began in 2017 will take place through the year 2037. As of 2024, the Haile Gold Mine is estimated to generate an annual economic impact of more than $568.7 million in Lancaster County alone. In addition, nearly 1,200 jobs in Lancaster County are supported, either directly or through economic multiplier effects, to the Haile Gold Mine. These jobs are also associated with approximately $106.3 million in annual labor income.

And while the majority of Haile's economic impact is in Lancaster County, it's operations also have a direct impact through hiring and purchase activity in the surrounding counties. This economic activity then creates further ripple effects throughout South Carolina through inter-industry supply networks and household spending that results in a total statewide footprint of $717.5 million in economic activity along with over 1,800 jobs and $141.8 million in labor income.

The purpose of this report is to estimate the total economic impact of the Haile Gold Mine, on Lancaster, Chester, Chesterfield, Fairfield, Kershaw, and York counties – as well as South Carolina as a whole. The report begins with a discussion of the economic impact methodology used, including a discussion of direct, indirect, and induced impacts. Section III then presents the main findings of this report. Section IV provides a broader economic overview of the surrounding region and illustrates the positive impact that the Haile Gold Mine is having on the area. Finally, Section V concludes with a brief summary of these results.

Section II

Economic Impact Methodology

An economic impact analysis seeks to determine the impact, or contribution, of an organization to its local economy. This impact is measured by estimating how the expenditures (or purchases) of an organization increase the demand for goods and services in the local economy. For example, if an existing mining company were to make a large purchase of new plant equipment, one might estimate the change in total employment or gross state product that would result from this increase in demand. There are three standard categories that are generally estimated that summarize the major contributions of an organization to its local economy: economic output, employment, and labor income. Each of these categories, in turn, can be broken down into direct, indirect, and induced effects.

The direct effect reflects all of the expenditures that the Haile Gold Mine makes directly within a particular region. This includes, for example, employee wages and benefits, mining development, equipment, vendors, and other overhead and administrative costs. These expenditures represent the initial change to the local economy.

The indirect effect reflects all of the additional economic impacts resulting from inter-industry linkages between local firms within a particular region. For example, if the Haile Gold Mine were to make a large purchase of machinery in Lancaster County, the machinery vendor would then have to purchase additional inputs from its suppliers and hire additional workers to handle this new order volume. The suppliers of the machinery vendor would then also experience an increase in demand and have to purchase additional staff and other inputs as well. These indirect effects ripple throughout the economic region and affect many industrial sectors. The total size of the indirect effect is a function of the size of the local supplier network and the size of the initial direct effects.

The induced effect reflects all of the additional economic impacts that result from increases in household spending due to changes in wages. For example, assume again that the Haile Gold Mine were to make a large machinery purchase in Lancaster County. The machinery vendor would purchase additional inputs and hire additional labor. These new workers, in turn, would spend some of their new income on goods and services in a variety of industries within the county – including housing, food, and entertainment. The housing, food, and entertainment industries in Lancaster County would then see an increase in demand, leading to the hiring of additional workers in these industries, leading to further increases in household spending, and so on.

These successive rounds of indirect and induced effects do not go on forever, which is why a specific value can be calculated for each of them. In each round of spending, money is "leaked out" of the region for a variety of reasons. For example, workers will save some of their additional income and part of the income they do spend will be spent outside of the county. Firms, too, will necessarily purchase some input materials from outside of the county.

An economic multiplier can be used to determine the total economic impact (direct, indirect, and induced) that results from an initial change in economic activity (the direct effect). For example, if the Haile Gold Mine spent $10 million on machine equipment and this led to a total increase in economic output of $15 million across all industries in the economy, the economic output multiplier would be 1.5. Multiplier effects vary across industries and, as mentioned above, depend largely on the size of the supplier network. They also depend on the size of the economic region being analyzed. For example, a $10 million purchase would have a larger impact in South Carolina than on Lancaster County alone. In addition to economic output, multiplier effects are also calculated for employment and labor income.

In this study, the economic impact of the Haile Gold Mine was estimated for multiple regions of South Carolina: (1) Lancaster County; (2) the three-county region of Lancaster, Chesterfield, and Kershaw counties; (3) the six-county region of Lancaster, Chesterfield, Kershaw, Fairfield, Chester, and York counties; (4) and the state of South Carolina as a whole. Data were collected from OceanaGold on all regional expenses, employment, and salaries associated with the current operations of the Haile Gold Mine to serve as the basis for all estimates in this analysis. To estimate the economic impacts in this study, a detailed structural model (known as an input-output model) of South Carolina that contains specific information on economic linkages between all industries and within all counties was used. In order to ensure that the uniqueness of local economic dynamics was considered, the input-output modeling software IMPLAN was combined with other customized regional forecasting models that were developed. This allows for the inclusion of additional local data, industry knowledge, and ongoing economic growth trends. Impact estimates were calculated for each of the three categories – defined below – that summarize the impact of the Haile Gold Mine, with each category's estimates broken down into direct, indirect, and induced effects:

Total Economic Impact (or Output): the dollar value representing the total contribution to overall economic activity

Employment: the total number of full-time equivalent jobs that are needed to deliver the demand for the goods and services as measured by total economic output

Labor Income: the total contribution to wages and salaries affiliated with total employment

OCEANAGOLD

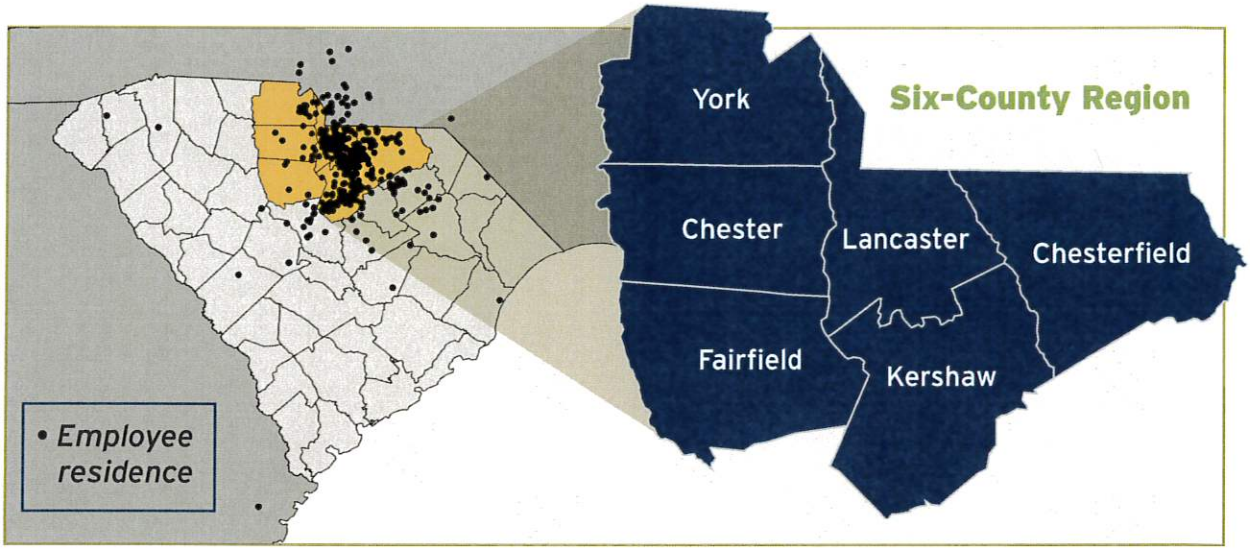
Section III

The Economic Impact of the Haile Gold Mine

Current Economic Activity of the Haile Gold Mine

Although the economic impact of the Haile Gold Mine extends across the state of South Carolina, the majority this impact is contained within the regions in and around Kershaw, S.C. – namely the six-county region of Lancaster, Chesterfield, Kershaw, Fairfield, Chester, and York counties. In other words, the majority of the dollars paid to employees of the mine and to in-state vendors that provide the mine with various supplies (e.g., equipment, computer software, etc.) are spent within this six-county region. For example, nearly 75 percent of all employees of the Haile Gold Mine live within this six-county region, as **Figure 1** denotes.

Figure 1 **Distribution of the Haile Gold Mine Direct Employment Base in South Carolina**



Economic Impact: Lancaster County

The Haile Gold Mine currently produces more than 200,000 ounces of gold each year while maintaining a direct employment base of approximately 731 full-time equivalent employees, with roughly 84 percent of this workforce living in South Carolina. This level of direct economic activity also leads to additional indirect and induced impacts through increases in demand for goods and services in other related industries as well as through increases in household spending activity - all of which are estimated using economic multipliers. Each impact is reported in **Table 1**, along with the accompanying totals. These totals represent the overall impact of the Haile Gold Mine on Lancaster County.

Table 1 **Economic Impact of the Haile Gold Mine on Lancaster County: 2024**

	Annual Employment	Annual Labor Income	Annual Economic Output
Direct Impact	731	$76,123,258	$451,418,989
Indirect Impact	290	$22,281,048	$88,233,867
Induced Impact	156	$7,906,827	$29,090,211
Total Impact	**1,177**	**$106,311,133**	**$568,743,067**

The total business operations of the Haile Gold Mine generate approximately $451.4 million in direct annual economic output. This level of direct economic activity leads to indirect effects totaling approximately $88.2 million along with an additional 290 jobs. These indirect effects arise from the increased demand for goods and services of local suppliers resulting from county-level expenditures on the part of the mine. Haile's direct economic output also leads to induced effects totaling $29.1 million in economic output and 156 jobs. This is a reflection of economic activity in Lancaster County generated across all industries that is the result of increased household spending. The combination of the direct, indirect, and induced effects leads to a total economic impact of approximately $568.7 million, which is associated with 1,177 jobs across Lancaster County.



Onsite at Haile Gold Mine, USA

Economic Impact: The Three and Six-County Regions and South Carolina

Even with its sizable impact inside Lancaster County, the Haile Gold Mine's economic presence is felt well-beyond the county borders. **Tables 2-4** specifically summarize the mine's total economic impact on the broader three- and six-county surrounding regions, as well as on South Carolina as a whole.

Table 2 **Economic Impact of the Haile Gold Mine on the Three-County Region: 2024**

Lancaster, Kershaw, and Chesterfield Counties



	Annual Employment	Annual Labor Income	Annual Economic Output
Direct Impact	731	$76,123,258	$451,418,989
Indirect Impact	331	$23,424,001	$104,287,553
Induced Impact	194	$9,042,029	$34,307,544
Total Impact	**1,256**	**$108,589,288**	**$590,014,086**

Table 3 **Economic Impact of the Haile Gold Mine on the Six-County Region: 2024**

Lancaster, Kershaw, Chesterfield, Fairfield, Chester, and York Counties



	Annual Employment	Annual Labor Income	Annual Economic Output
Direct Impact	731	$76,123,258	$451,418,989
Indirect Impact	403	$28,843,706	$134,027,365
Induced Impact	279	$12,873,654	$48,562,828
Total Impact	**1,413**	**$117,840,618**	**$634,009,182**

Table 4 **Economic Impact of the Haile Gold Mine on the South Carolina: 2024**



	Annual Employment	Annual Labor Income	Annual Economic Output
Direct Impact	731	$76,123,258	$451,418,989
Indirect Impact	580	$40,129,824	$175,021,833
Induced Impact	522	$25,576,489	$91,037,549
Total Impact	**1,833**	**$141,829,571**	**$717,478,371**



Employee at the process plant in Kershaw

Note that the total economic impact of the Haile Gold Mine increases from $568.7 million in Lancaster County to over $590.0 million when including both Kershaw and Chesterfield counties – and then to $634.0 million for the six-county surrounding region. This roughly 11 percent increase reflects the additional economic activity generated through expenditures made by the Haile Gold Mine in the surrounding counties as well as by spending activity that occurs among households outside of Lancaster County. For example, approximately 31 percent of all Haile employees live in Kershaw County. These employees, on average, will spend more of their total income in Kershaw County than they will in Lancaster County. Similarly, among the 36 percent of Haile's workforce that lives in neither Lancaster nor Kershaw County, a majority of these employee wages are spent elsewhere in South Carolina.

Table 4 provides estimates detailing the economic impact of the Haile Gold Mine on the state of South Carolina as a whole. When examining these state level estimates, one can observe that total economic output rises by 26.2 percent when compared to Lancaster County alone. This illustrates that while the total economic impact of the Haile Gold Mine is largely concentrated in Lancaster County and the surrounding six-county region, it nevertheless maintains a significant statewide footprint. In addition, with the active production phase of the Haile Gold Mine expected to extend another thirteen years, this implies that the cumulative statewide economic impact of the Haile Gold Mine will total more than $9.3 billion by the year 2037.

The cumulative economic impact of the Haile Gold Mine on South Carolina is projected to total more than **$9.3 billion** by the year 2037.

Economic Impact: Contributions to State Tax Revenue

Another major impact of the Haile Gold Mine arises from the increase in state tax revenue that results from the economic activity it supports. As summarized in **Table 4**, the total economic impact of the Haile Gold Mine for the state of South Carolina is approximately $717.5 million.

Historically, every additional dollar that is generated in economic activity (i.e., nominal gross state product) within South Carolina also generates 4.4 cents in new state tax revenue.[1] By applying this figure to the economic activity generated by the Haile Gold Mine, the tax revenue from this total volume of activity can be estimated.[2] **Table 5** displays these results, which show that the annual total estimated tax revenue that arises from the Haile Gold Mine is approximately $16.4 million.

Table 5 **Estimated Annual State Tax Revenue Derived from the Haile Gold Mine in 2024**

Category	Dollar Value
Estimated Economic Output for South Carolina	$717,478,371
Estimated Tax Revenue Generated for South Carolina	$16,391,905



Worker sorting deliveries to the Warehouse

1. The historical relationship between South Carolina nominal gross state product and the South Carolina General Fund revenue (as measured and tracked by the South Carolina Board of Economic Advisors) was estimated by the Division of Research using industry-standard time-series regression techniques.
2. Economic output represents the value of industry production and is therefore not synonymous with gross state product. As such, the dollar value of all intermediate inputs was subtracted from economic output before the 4.4-cent estimate was applied to estimate total tax revenue.

Section IV

Contributions to Regional Economic Development

Although Section III highlights the broad-based contributions of the Haile Gold Mine throughout South Carolina, the specific economic benefits arising from employment opportunities and higher incomes for local residents in the surrounding communities cannot be overstated. In recent decades, the bulk of South Carolina's economic growth has primarily come from within its major metropolitan areas, while more rural areas of the state have often experienced either stagnant or negative growth. For example, in the six-county region surrounding the Haile Gold Mine, only York and Lancaster counties have experienced meaningful population growth in recent years, as shown in **Table 6**. Both counties have benefitted from the strong economic growth in the neighboring Charlotte market, becoming bedroom communities for this thriving North Carolina area.

Table 6 **Annualized Population Growth Estimates for Selected S.C. Regions**

Source: U.S. Census Bureau & SC Office of Revenue & Fiscal Affairs Projected

Region	Annualized Pop. Growth (2010-2023)	Annualized Pop. Growth (2023-2040)
Chester County	-0.3%	-0.2%
Chesterfield County	-0.6%	-1.1%
Fairfield County	-1.3%	-2.5%
Kershaw County	+0.8%	+0.7%
Lancaster County	+2.6%	+2.3%
York County	+2.2%	+1.9%
South Carolina	**+1.1%**	**+1.0%**



OceanaGold Haile Gold Mine, USA in Lancaster County, South Carolina

The Haile Gold Mine's ability to provide job opportunities for individuals in rural counties is helping to both mitigate the economic struggles associated with population decline as well as helping to retain local talent, which can also serve to boost long-run community development.

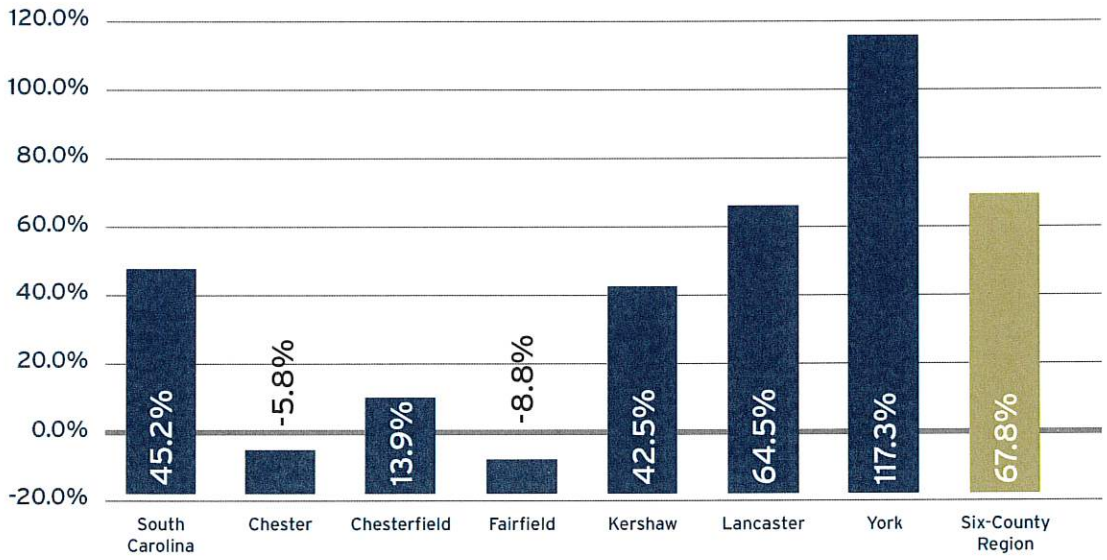
The ongoing operations of the Haile Gold Mine have helped to support local communities in all six of these counties, including those that have struggled the most to boost long-run population and economic growth. This section provides an overview of the primary demographic and socioeconomic trends within the counties of this region and illustrates the contributions that the Haile Gold Mine is making.

Employment and Industry

As previously noted, York County experienced the highest growth rate in population in the region over the previous three decades as the positive benefits of Charlotte have grown. **Figure 2** shows the cumulative employment growth for each county since 1990. Note that while the six-county region's total employment growth exceeds the state overall, the growth was driven primarily from Lancaster and York counties. Both Chester and Fairfield counties experienced employment contraction over this 24-year period.

This trend is consistent with many of South Carolina's more rural counties as populations and jobs have shifted towards the metropolitan areas of the state. The Haile Gold Mine's ability to provide job opportunities for individuals in rural counties is helping to both mitigate the economic struggles associated with population decline as well as helping to retain local talent, which can also serve to boost long-run community development.

Figure 2 **Cumulative Employment Growth, 1990-2024**
Source: U.S. Bureau of Labor Statistics, LAUS, September 2024



When measured by total employment, mining is one of South Carolina's smallest industries, with less 2,200 people estimated to be employed in the Mining, Quarrying, and Gas & Oil Extraction sector statewide. This represents around 0.1 percent of the state's employment base. However, mining is roughly 25 times more concentrated in Lancaster County, with an estimated 2.6 percent of the workforce engaged in Mining, Quarrying, and Gas & Oil Extraction. **Table 7** summarizes the five largest industries in South Carolina and in each of the six counties surrounding the Haile Gold Mine, along with the average wage in each industry. As will be described in more detail later in this report, the average annual wage of employees at the Haile Gold Mine is approximately $86,485. This implies that the Haile Gold Mine is offering highly competitive wages and is, on average, paying more than most other major industries in the surrounding region. In addition, although men currently comprise the majority of the mining industry's workforce in the United States, the Haile Gold Mine offers many opportunities for women across a variety of occupations. Women currently comprise approximately
27 percent of professional and senior professional positions at the Haile Gold Mine.

The Haile Gold Mine is offering highly competitive wages and is, on average, paying more than most other major industries in the surrounding region. In addition, women currently represent approximately 27 percent of professional and senior professional positions at the Haile Gold Mine.



Workers prepare gold bars in Haile Gold Mine's refinery

Table 7 **Largest Industries with Accompanying Avg. Industry Wages in Selected S.C. Counties, Ranked by Total Employment**

Source: Quarterly Workforce Indicators, U.S. Census Bureau, 2023Q4

Industry Ranking	South Carolina	Chester	Chesterfield	Fairfield	Kershaw	Lancaster	York
1	Health Care & Social Asst. ($63,948)	Manuf. ($66,228)	Manuf. ($66,804)	Manuf. ($64,464)	Retail Trade ($32,124)	Health Care & Social Asst. ($56,628)	Accom. & Food Service ($24,060)
2	Manuf. ($75,660)	Wholesale Trade ($87,864)	Health Care & Social Asst. ($44,100)	Utilities ($121,200)	Manuf. ($70,260)	Retail Trade ($36,060)	Retail Trade ($37,872)
3	Retail Trade ($39,660)	Retail Trade ($29,028)	Transp. & Warehousing ($43,032)	Education (N/A)	Health Care & Social Asst. ($61,944)	Manuf. ($66,228)	Health Care & Social Asst. ($56,556)
4	Education (N/A)	Public Administration ($38,400)	Education (N/A)	Health Care & Social Asst. ($40,968)	Accom. & Food Service ($22,272)	Education (N/A)	Manuf. ($76,596)
5	Accom. & Food Service ($26,760)	Construction ($78,348)	Retail Trade ($33,360)	Retail Trade ($40,464)	Education (N/A)	Accom. & Food Service ($23,280)	Education (N/A)

Age and Education

As shown in **Table 8**, York County has the youngest population across the six-county region surrounding the Haile Gold Mine with a median age of 39.2 and is the only county with a median age below that of the state average (at 40.0). According to the U.S. Census Bureau, the share of the population over the age of 65 is expected to steadily increase in both South Carolina and across the U.S. over the next decade as the Baby Boomer generation retires. As such, finding a skilled and available workforce is becoming more challenging for many businesses, especially those located within rural counties struggling with declining employment and population as younger individuals move out of the area for other opportunities.

Table 8 **Median Population Age**

Source: American Community Survey, 5-Year Estimates, 2022

Region	Median Age
United States	38.5
South Carolina	40.0
Chester	41.8
Chesterfield	42.6
Fairfield	46.6
Kershaw	40.6
Lancaster	42.2
York	39.2



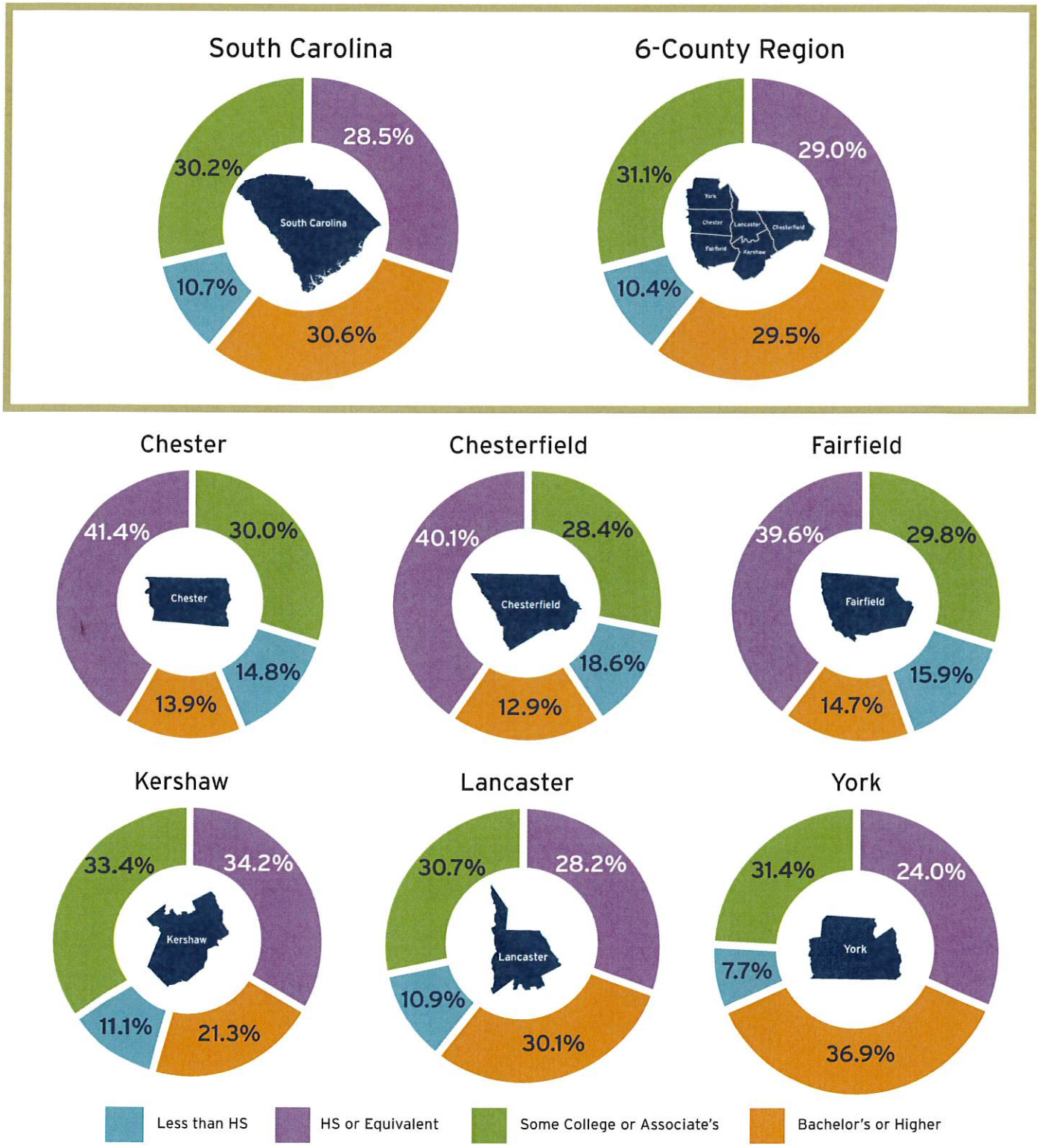
Educational attainment across the six-county region surrounding the Haile Gold Mine is comparable to the distribution in South Carolina, with York County residents generally having the highest levels of attainment. More specifically, York County has a higher percentage of residents with a bachelor's degree or higher (36.9%) than any other county.

OCEANAGOLD

Figure 3

Educational Attainment by Region, Population 25+

Source: American Community Survey, 5-Year Estimates, 2022



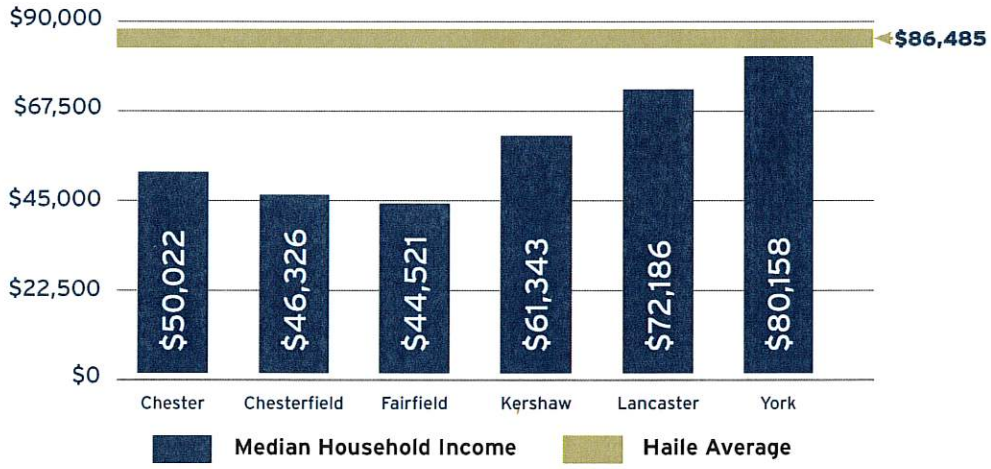
Income Levels

Just as employment growth rates have been strongest in Lancaster and York counties, so too have household income levels. York and Lancaster counties maintain the highest median household income levels within the six-county region surrounding the Haile Gold Mine ($80,158 and $72,186), while Fairfield County maintains lowest median household income level ($44,521) within the region. By contrast, South Carolina's median household income level is currently estimated to be $63,623, which is about 15 percent below the U.S. average.

Moreover, using 2023 payroll data provided by Oceanagold, these estimates can also be directly compared to the average earnings of employees at the Haile Gold Mine. As **Figure 4** reveals, the average annual employee compensation of the Haile Gold Mine significantly exceeds the median household income in every county in the six-county region.

Figure 4 **Median Household Income**

Source: American Community Survey, 5-Year Estimates, 2022



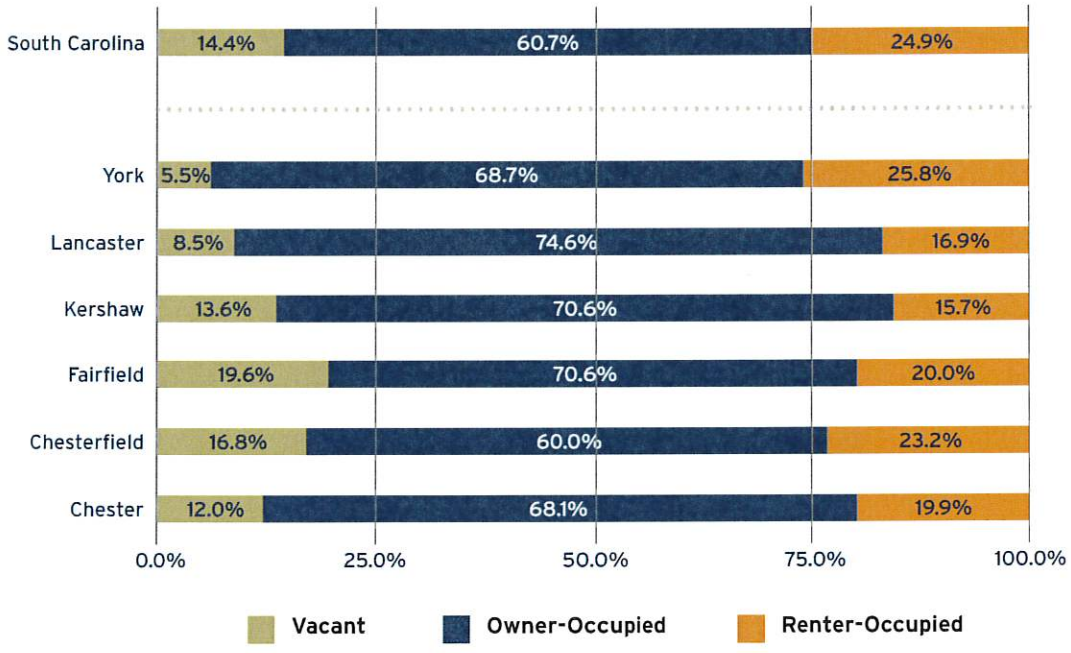
The average annual employee compensation of the Haile Gold Mine significantly exceeds the median household income in every county in the six-county region.

Housing and Cost of Living

In recent decades, South Carolina's rural counties have experienced a noticeable outmigration of population as many residents, particularly younger generations, seek better economic opportunities in urban and suburban areas. Communities facing these population declines often must confront economic stagnation and the various challenges surrounding the ability to sustain local services. Declines in population can also lead to increases in vacant housing units and depressed property values. Within the six-county region surrounding the Haile Gold Mine, Fairfield County currently maintains the highest housing vacancy rate at 19.6 percent while York County maintains the lowest at 5.5 percent. In the split between owner-occupied and renter-occupied housing units, Kershaw County has the highest percentage of owner-occupied units. **Figure 5** summarizes these estimates.

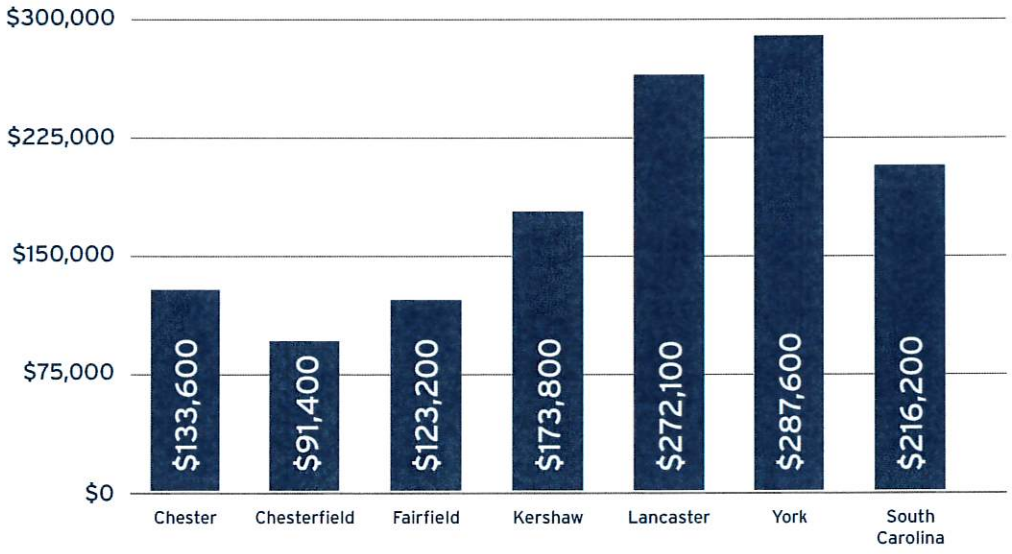
Figure 5 **Distribution of Housing Units**

Source: American Community Survey, 5-Year Estimates, 2022



Median home values in each county typically follow similar trends, with the lowest values typically occurring in the most rural counties and the highest values being found in the more urban/suburban areas. Both Lancaster and York counties have median home values higher than the median home value for South Carolina as a whole, as shown in **Figure 6**.

Figure 6 **Median Home Value for Owner-Occupied Units**
Source: American Community Survey, 5-Year Estimates, 2022

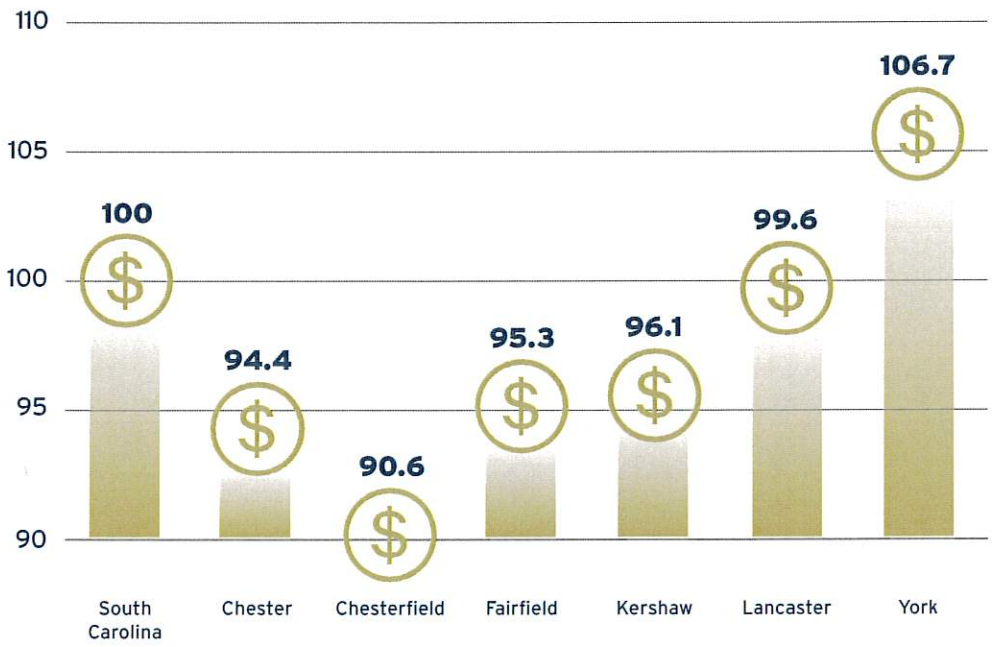




Drill transportation onsite at Haile Gold Mine, USA

While median home prices vary by county, there are also significant differences in the overall cost-of-living. As **Figure 7** denotes, within the six-county region surrounding the Haile Gold Mine, York County is the only one with a higher cost-of-living than the state average. York County's cost of living index is 106.7, meaning that the cost of living in York County is approximately 6.7 percent higher than the average cost of living across all of South Carolina. Conversely, Chesterfield County has the lowest estimated cost-of-living at 90.6 - or nearly 10 percent lower than the state average.

Figure 7 **Estimated Cost-of-Living Index**
Source: Massachusetts Institute of Technology and the U.S. Bureau of Labor Statistics



Section V

Conclusion

The Haile Gold Mine makes a sizable contribution to the economies of both Lancaster County as well as to the surrounding regions. The active production of the Haile Gold Mine that began in 2017 will extend through the year 2037, generating an annual economic impact of more than $568.7 million in Lancaster County alone. This level of economic activity also supports (directly and indirectly) 1,200 jobs within the county along with $106.3 million in labor income.

The bulk of the Haile Gold Mine's hiring and purchase activities also extend to Chester, Chesterfield, Fairfield, Kershaw, and York counties, and the total economic activity generated by the mine within each of these counties ripples through the rest of South Carolina through various supply networks and household spending. Thus, even though the majority of the economic impact of the Haile Gold Mine occurs within Lancaster County, it also has a sizable effect elsewhere in the state, with an annual economic impact in South Carolina totaling approximately $717.5 million along with over 1,800 jobs. Moreover, the cumulative economic impact of the Haile Gold Mine on South Carolina is expected to total more than $9.3 billion by the year 2037.

In recent decades, the bulk of South Carolina's economic activity has primarily come from its major metropolitan regions, while more rural areas of the state have often experienced either stagnant or declining growth rates. As such, the economic benefits generated by the Haile Gold Mine through employment opportunities and higher incomes for local residents in the surrounding communities cannot be overstated. The ongoing operations of the Haile Gold Mine have provided significant support to local rural communities in South Carolina and will continue to play a crucial role in fostering economic stability and development in the region.


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www.hailegoldmine.com

Schedule C

INDIAN LAND FIRE DISTRICT

EXECUTIVE SUMMARY

Lancaster County
South Carolina

Executive Summary

Indian Land Fire District

The Indian Land Fire District (ILFD) respectfully submits this budget request for inclusion in the 2026–2027 budget cycle. This request reflects documented growth, increasing service demand, and operational conditions that require action to maintain acceptable emergency response capabilities across the district.

Emergency activity has risen sharply. ILFD responded to 3,379 incidents in 2024 and 3,941 incidents in 2025—an increase of more than 16 percent in one year. These incidents include structure fires, serious motor vehicle collisions, technical rescues, and complex fireground operations. Increased call volume has resulted in more frequent simultaneous incidents and greater strain on existing resources.

District-wide response metrics remain near recognized benchmarks; however, those averages mask a persistent coverage gap in the northern portion of the district. First-arriving units in this area regularly experience response times of 12 to 14 minutes, exceeding accepted fire service standards. Automatic aid agreements provide valuable support but cannot be relied upon consistently due to concurrent incidents in neighboring jurisdictions. When district units are repositioned to mitigate this gap, service levels are reduced elsewhere.

As development continues, these response challenges are expected to intensify. Extended response times are directly associated with increased property loss, higher risk of civilian and firefighter injury, and increased long-term costs. Additionally, several frontline fire engines are reaching an age where maintenance requirements and out-of-service time are increasing, reducing overall fleet reliability.

To address these documented conditions, ILFD has identified the construction of Fire Station 3 as an essential public safety need, along with the acquisition of three (3) fire engines. Fire Station 3 is necessary to provide adequate coverage in one of the fastest-growing areas of Lancaster County and to restore balanced response capability throughout the district. Two engines will replace aging frontline apparatus to improve reliability and reduce maintenance exposure, while a third engine will support operations at the new station and accommodate continued growth.

These investments support clear, measurable outcomes for the community. Improved response times reduce property loss and improve medical survivability. Reliable apparatus availability helps control overtime expenditures, enhances firefighter safety, and supports workforce stability. Proactive capital investment also reduces the long-term financial impact associated with delayed infrastructure and emergency-driven replacement.

The Indian Land Fire District remains committed to fiscal responsibility, transparency, and long-term planning. This request represents a necessary investment based on documented growth and operational demand. ILFD appreciates the County's continued partnership and thoughtful consideration as we work together to ensure emergency services remain aligned with the needs of Lancaster County residents.

Impact on Insurance Rates and Community Costs

Fire protection ratings used by the insurance industry consider several core factors, including response times, station distribution, apparatus availability, and staffing reliability. These ratings play a direct role in how insurers evaluate community risk and ultimately influence insurance premiums for homeowners and businesses.

As outlined previously, portions of the district—particularly the northern response area—experience extended first-due response times. From an insurance perspective, longer response intervals increase the likelihood of greater fire loss, higher claim severity, and increased overall risk exposure, especially as residential and commercial density continues to rise.

The construction of Fire Station 3 and the addition of three engine companies directly address these rating factors. Improved station proximity, reliable apparatus availability, and consistent staffing enhance the district's fire protection profile and support more favorable insurance evaluations. Faster initial response reduces fire spread, limits property damage, and lowers the severity of insured losses.

From a community standpoint, proactive investment in fire protection infrastructure helps stabilize long-term insurance risk as development continues. Delayed or insufficient infrastructure expansion increases the potential for higher premiums, reduced insurer participation, and greater financial burden on property owners. Maintaining strong fire protection services supports not only public safety, but also the long-term affordability of living and operating a business in Indian Land.

Call Volume Growth Projections

The Indian Land community and surrounding areas of Lancaster County continue to experience sustained population growth and development, resulting in increased demand for emergency services. Recent U.S. Census data identifies South Carolina as the fastest-growing state in the nation, with Lancaster County among the highest-growth areas statewide. These trends are reflected in the Indian Land Fire District's recent call volume increases.

Using historical response data and current development patterns, ILFD projected future emergency service demand utilizing a conservative annual growth rate of 16.6 percent. This rate aligns with recent year-over-year increases and accounts for ongoing residential and commercial expansion within the district. Projected call volume reflects compounded annual growth based on the 2024 baseline.

Projected Emergency Call Volume

Year	Projected Calls	Increase from 2024
2024	3,379	—
2025	3,941	+16.6%
2026	4,595	+36%
2027	5,358	+59%
2028	6,250	+85%
2029	7,288	+116%

Under this projection, annual calls for service are expected to more than double within five years. Sustained increases of this magnitude will continue to impact response times, unit availability, staffing workload, and apparatus utilization if facilities and resources are not expanded in parallel with growth.

Proactive planning based on projected demand allows the County and Fire District to manage operational risk, maintain predictable long-term costs, and ensure public safety infrastructure scales appropriately with community development.

Major Budget Requests – FY 2026–2027

The following capital and operational requests are necessary to maintain public safety, manage rapid service demand growth, and address documented response time and infrastructure deficiencies. These requests prioritize life safety, firefighter safety, and long-term cost control.

Capital Improvement Plan (CIP) Requests

Fire Station 3 – $7,500,000
Construction and outfitting of a new fire station in the northern portion of the district to address extended response times (12–14 minutes), improve geographic coverage, and stabilize District-wide service delivery. This project is critical to meeting response time expectations in one of the fastest-growing areas of Lancaster County.

Three (3) Engine Companies – $3,600,000
Purchase of three fire engines to support increased call volume and operational reliability:

- Two engines will replace aging first-out apparatus experiencing frequent maintenance and increased downtime.
- One engine will be assigned to Fire Station 3 to support new station operations and accommodate continued growth.

This investment reduces out-of-service risk, improves response reliability, and lowers long-term maintenance costs.

Fire Station 1 Concrete Repairs – $320,000
Repair and replacement of deteriorating concrete surfaces to ensure safe apparatus movement, protect equipment, and reduce operational and liability risks at the district's busiest station.

Operational & Special Project Projections for 26-27 Budget

Rescue Company Staffing – 9 Firefighters – $889,632
Establishes consistent staffing for rescue operations, improving response capability for technical rescues, vehicle extrications, and high-risk incidents while reducing overtime demands and enhancing firefighter safety.

Logistics and Safety Coordinator – $62,000
Provides centralized management of equipment, PPE, apparatus readiness, and station safety programs, improving accountability, extending equipment service life, and reducing operational inefficiencies.

Station Security (Gates and Fencing) – $60,000
Enhances facility security for personnel, apparatus, and equipment, reducing theft, vandalism, and liability exposure.

Equipment and Brush Truck Storage Building – $85,000
Provides protected storage for critical specialty vehicles and response equipment, reducing weather-related deterioration and extending service life.

Firefighter Bail-Out Kits – $60,000
Provides personal emergency self-rescue systems for firefighters operating in large residential and mid-rise buildings, improving survivability during high-risk fire conditions and enhancing overall firefighter safety.

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Strategic Alignment Table – Indian Land Fire District Budget Requests

Capital Improvement Plan Requests

Budget Item	Purpose / Need	Lancaster County Strategic Goal Alignment	Expected Outcome / Benefit
Fire Station 3 – $7,500,000	Reduce extended response times in the northern portion of the district and improve coverage in rapidly growing areas	Meeting growth demands while maintaining reliable public safety services	Faster response times, improved service reliability, reduced risk to residents and firefighters
Three Engine Companies – $3,600,000	Replace aging frontline apparatus and provide capacity for increased call volume and new station operations	Implement a consensus-supported fire service growth management plan	Improved apparatus reliability, enhanced response capacity, increased firefighter safety
Fire Station 1 Concrete Repairs – $320,000	Address deteriorating concrete surfaces to maintain safe apparatus movement and operations	Infrastructure improvement and service quality	Reduced accident risk, protection of district assets, lower long-term repair costs

Operational & Special Project Requests

Budget Item	Purpose / Need	Lancaster County Strategic Goal Alignment	Expected Outcome / Benefit
Rescue Company Staffing – 9 Firefighters – $889,632	Ensure adequate staffing for technical rescues and multi-unit emergencies	Enhancing public safety service delivery and emergency readiness	Safer, faster rescue operations; reduced overtime costs; improved firefighter survivability
Logistics / Safety Coordinator – $62,000	Centralized management of equipment, PPE, and station safety	Infrastructure and operational readiness	Equipment accountability, longer apparatus lifespan, improved operational efficiency
Station Security – Gates & Fencing – $60,000	Protect personnel, apparatus, and facilities	Enhancing public safety service delivery	Reduced risk of theft/vandalism, protected investments, safer work environment
Equipment / Brush Truck Storage – $85,000	Protect specialized vehicles and equipment	Infrastructure improvement and service quality	Extended equipment lifespan, reduced replacement cost, improved operational readiness
Firefighter Bail-Out Kits – $60,000	Self-rescue equipment for high-rise/residential incidents	Enhancing public safety service delivery	Improved firefighter survivability, compliance with safety best practices

Strategic Outlook: Next Five to Eight Years

The following items are provided for long-range planning awareness and fiscal transparency. They reflect projected needs based on current growth trends and development patterns and are not requests for current funding. Inclusion is intended to support forward-looking discussion and coordination as community conditions continue to evolve.

- **Future Fire Station 4 – Southern District Coverage**
  - Potential land acquisition in the Highway 75 and Highway 521 corridor to support future response coverage
  - Preliminary design and planning aligned with projected development patterns
- **Centralized Headquarters Facility (Long-Range Planning)**
  - Identification of potential locations for a centralized administrative and operational headquarters
  - Existing County-owned property along Shelley Mullis Road near Roy Hardin Park represents a potential long-term option for consideration
- **Heavy Rescue Apparatus Replacement**
  - Projected replacement of the current 2012 heavy rescue apparatus
  - Estimated apparatus build time of approximately 47–48 months, requiring advanced planning
- **Organizational and Staffing Projections**
  - Potential addition of a second Deputy Chief position as operational complexity and staffing levels increase
  - Future maintenance personnel to support expanded apparatus and facility inventories
  - Additional Fire Marshal personnel to support inspections, code enforcement, and fire investigations as commercial development continues

This strategic outlook is intended to provide visibility into potential future needs and timelines. Actual implementation will depend on growth trends, available funding, and County priorities, allowing for coordinated planning between Lancaster County and the Indian Land Fire District.

Executive Summary Closing Statement

The Indian Land Fire District continues to experience sustained growth and increasing demand for emergency services as the Indian Land community and surrounding areas expand. Rising call volume, more complex incidents, and greater operational demands continue to place pressure on existing infrastructure, apparatus, and staffing resources.

Strategic investment in Fire Station 3, additional and replacement engine companies, and targeted operational support is essential to maintaining reliable response times, enhancing firefighter safety, and protecting life and property throughout the district. These investments support effective management of simultaneous incidents, strengthen technical rescue and emergency medical capabilities, and ensure the district can meet community needs without compromising service quality.

The proposed requests align with Lancaster County's strategic goals for sustainable growth, infrastructure readiness, and the consistent delivery of professional emergency services. Through proactive planning, timely infrastructure investment, and responsible resource management, the district is positioned to deliver efficient and fiscally sound services while minimizing long-term operational risk.

The Indian Land Fire District sincerely appreciates the continued partnership and support of County Council. With this collaboration, the district can remain responsive to evolving community needs and continue providing timely, professional emergency services. These investments will help ensure Indian Land remains a safe, resilient, and well-prepared community today and into the future, supporting the County's commitment to public safety, responsible growth, and the well-being of its residents.

Lancaster County
South Carolina

Lancaster County Council Retreat
January 29, 2026

Council Members
District 1: Stuart Graham
District 2: Charlene McGriff
District 3: Billy Mosteller, Vice Chair
District 4: Jose Luis
District 5: Steve Harper
District 6: Bryant Neal, Secretary
District 7: Brian Carnes, Chair

Interim County Administrator
Steve Willis

County Attorney
Ginny L. Merck-Dupont

Clerk to Council
Sherrie Simpson

1

Lancaster County
South Carolina

1. **Call to Order Regular Meeting – Chairman Brian Carnes**
2. **Approval of the Agenda**

2

Lancaster County South Carolina

3. Citizen Comments

[Lancaster County Council welcomes comments and input from citizens who may not be able to attend Council meetings in person. Written comments may be submitted via mail to ATTN: Sherrie Simpson, Post Office Box 1809, Lancaster, SC, 29721, by email to Sherrie Simpson at ssimpson@lancastercountysc.gov or by online submission by selecting the "Citizens Comments" quick link located on the County website homepage at https://www.lancastercountysc.gov. Comments must be no longer than approximately 3 minutes when read aloud. Comments received will be acknowledged during the Citizens Comments portion of the meeting. Comments will need to be received prior to 4:00 p.m. on the day of the meeting. Please use the same link above in order to submit input/comments for Public Hearings. Please note that any handouts presented to Council become an official part of the record and a copy is attached to the legal minutes for the meeting.]

3

Lancaster County South Carolina

4. Discussion Items

a. Council Direction: Policy Priorities and Next Actions – *Steve Willis / Sabrena Harris*

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Lancaster County
South Carolina

County Council Retreat
Proactive Policy Making for 2050

Council Direction: Policy Priorities and Next Actions

Steve Willis

Sabrena Harris

January 29, 2026

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Council Direction: Policy Priorities and Next Actions

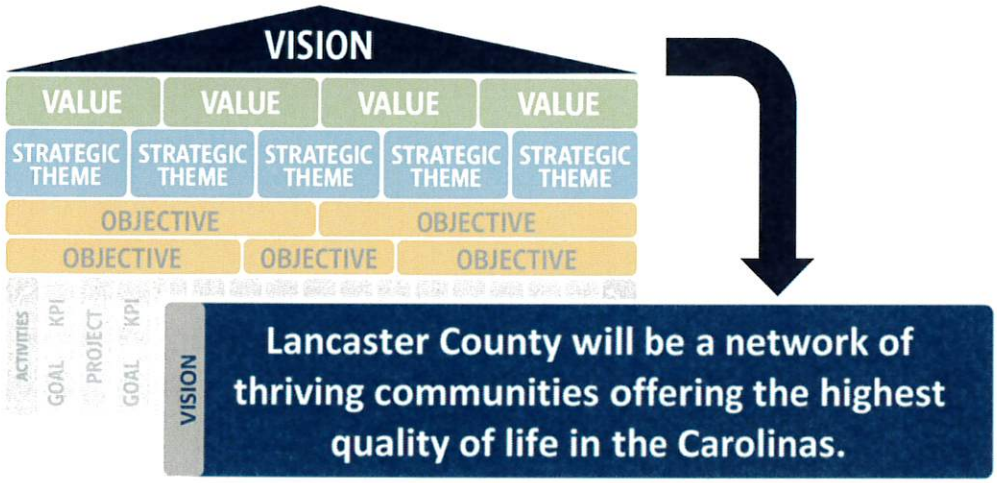
How do we get from **VISION** to **DIRECTION**?

- One Lancaster County 2050
- Translate vision into priorities staff can act on
- Today's focus: near-term policy direction
- What are our next action steps?



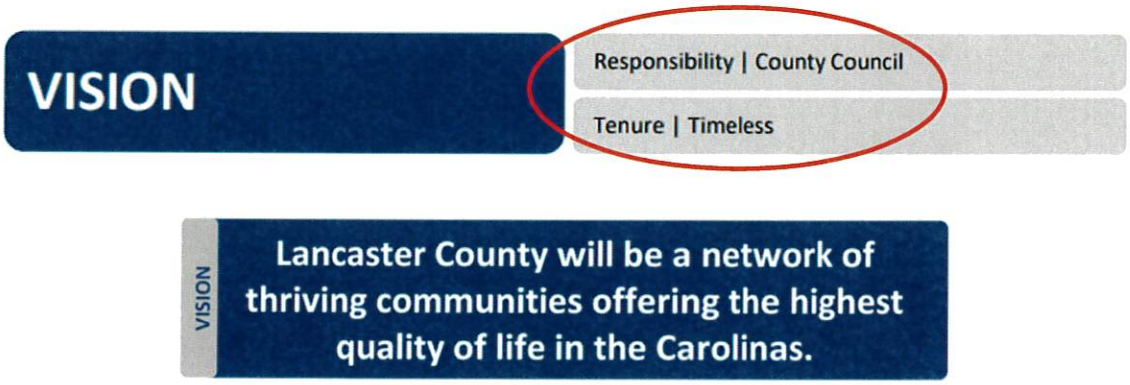
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Council Direction: Policy Priorities and Next Actions



7

Council Direction: Policy Priorities and Next Actions



8

Council Direction: Policy Priorities and Next Actions

Lancaster County South Carolina

MISSION

Responsibility | County Council & Staff

Tenure | Timeless

MISSION

Our mission is to enhance our community's quality of life by enabling people to live, learn, work, worship, play, and grow - both personally and professionally.

To deliver this mission, we listen to our community and leverage strategic partnerships which serve our citizens and visitors in ways that they find to be timely, high-quality, and efficient.

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Council Direction: Policy Priorities and Next Actions

Lancaster County South Carolina

What Decision Are We Making?

- What priorities should guide County decisions and FY27 budget development?
- Council sets the direction.
- Staff will align their requested resources and future actions and to facilitate the plan.
- Priorities help staff manage trade-offs.
- We are not focused on or approving projects or funding.
- We are getting crystal clear on what matters more.
- We are identifying and ranking primary and supporting priorities.
- Focus of "**what success looks like**" versus "**what we build or buy**"

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Council Direction: Policy Priorities and Next Actions

Areas of Importance (in no particular order)

- Growth vs. sustainability
- Public safety readiness
- Infrastructure and asset maintenance
- Workforce capacity
- Financial sustainability
- Quality of life
- Operational efficiency

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Council Direction: Policy Priorities and Next Actions

Activity

- Designate a driver
- Agree on time limits
- Set timer
- Navigate to spreadsheet to capture Council input

12

Council Direction: Policy Priorities and Next Actions

Lancaster County South Carolina

Recap Priorities

- Do these priorities reflect Council's intent?
- Before we call these priorities final, is there any remaining, minor fine-tuning?
- What we settle on here becomes the guidance staff will rely on as they move forward with developing their FY27 budget requests.

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USE ONLY IF WE NEED HELP THINKING!!!

Lancaster County South Carolina



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Growth vs. Sustainability

- Growth pays for itself - New development contributes sufficient revenue to cover its service and infrastructure demands.
- Capacity keeps pace with growth - Roads, public safety, and utilities are not consistently playing catch-up.
- No decrease of existing service levels - Current residents do not experience declining services as growth continues.
- Predictable development decisions - Developers and residents understand expectations and timelines.
- Long-term costs are visible upfront - Maintenance and operating costs are considered before growth decisions are made.

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Public Safety Readiness

- Response times remain consistent - Emergency services meet response standards as population grows and land is developed.
- Staffing matches service demand - Police, Fire, EMS, and other public safety staffing levels align with workload realities.
- Facilities support operations - Stations, equipment, and technology enhance, not limit, effective service.
- Preparedness for major events - The County is ready for disasters, severe weather, and large-scale incidents.
- Community trust and visibility - Public safety services remain visible, responsive, and trusted by residents.

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Infrastructure & Asset Maintenance

- Maintain before expanding - Existing roads, buildings, and systems are kept in good condition.
- Fewer emergency repairs - Proactive maintenance reduces costly, last-minute fixes.
- Assets last as long as intended - Buildings and equipment reach their full useful life.
- Clear maintenance priorities - Critical assets are identified and funded first.
- Reduced deferred maintenance - The backlog of aging infrastructure steadily decreases.

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Workforce Capacity

- Positions are filled and retained - Fewer vacancies and lower turnover in critical roles.
- Staff workload is manageable - Employees are not routinely stretched beyond reasonable capacity.
- Competitive recruitment and pay - The County remains an employer of choice in a competitive labor market.
- Skills match service needs - Staff have the training and expertise to meet modern service demands.
- Leadership continuity - Institutional knowledge is preserved through effective succession planning.

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Financial Sustainability

- Stable revenue assumptions - Budgets rely on realistic, sustainable revenue growth.
- Strong reserves are protected - Fund balance policies are maintained and respected.
- Debt remains manageable - Borrowing aligns with long-term affordability.
- Flexibility for the unexpected - The County is equipped to respond to emergencies or changes in the economy.
- Costs don't outpace revenues - Ongoing expenses grow at a pace the County can sustain.

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Quality of Life

- Accessible services across the County - Residents can reach services regardless of location.
- Parks, recreation, and amenities keep pace - Quality of life assets grow alongside population.
- Living in the County remains a priority - Growth does not diminish community character and personality.
- Safe, well-maintained public spaces - Facilities and grounds are clean, functional, and welcoming.
- Balanced community investment - Decisions reflect both economic vitality and resident well-being across the entire County.

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Operational Efficiency

- Cost-effective service delivery - Processes minimize waste and duplication.
- Technology improves service delivery - Systems support faster, more accurate work.
- Clear performance expectations - Departments know what success looks like.
- Consistent decision-making - Policies guide choices rather than exceptions.
- Transparency builds trust - Residents understand how resources are used and why

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What other questions do you have?



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Lancaster County
South Carolina

4. Discussion Items

b. Where We Are Today: Transportation & Mobility Updates – *Jeff Catoe / Tim Greene*

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Lancaster County
South Carolina

SCDOT ROADS UPDATE



County Council Retreat
January 29, 2026

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Lancaster County South Carolina

SCDOT ROADS UPDATE

- Lancaster County has roughly 1,400 miles of publicly maintained roadway, over 900 are owned/maintained by SCDOT
- SCDOT has 7 Districts in South Carolina
- Lancaster County is in District 4 (York, Lancaster, Chester, Cherokee, Union, Fairfield, and Chesterfield)
- Each District consists of a construction and maintenance division

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Lancaster County South Carolina

SCDOT ROADS UPDATE

- SCDOT administered road projects in Lancaster County:
- 2024 / 2025
  - Marvin Road / Charlotte Highway Intersection- In progress (June)
  - Van Wyck Road, Williams Circle, Pink Dogwood Avenue, Drywood Circle, Oakdale Drive, Kaywood Drive, Patton Street, Mason Street, Abby Court, Old Lansford Road, Catoe Road, SC 9 bypass- Complete
  - Fork Hill Road (Bridge)- Complete, will reopen in April

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Lancaster County South Carolina

SCDOT ROADS UPDATE

- SCDOT administered road projects in Lancaster County:
- 2024 / 2025
  - Old Lancaster Highway, Edwards Avenue, West Hilton Street, West Pine Street, Howle Street, Oakhaven Drive, Douglas Heights, Gillsbrook Road, Cimmeron Road, Hunter Street, Central Avenue, Shiloh Unity Road, Harrisburg Road- Complete
  - 521 bypass, Memorial Park Road, N Floyd Street, Johnston Street, Erwin Street, Oakdale Drive, Williams Circle, Continental Drive, Mtn Laurel Road, Lynwood Drive- All Pending with November 2026 target completion

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Lancaster County South Carolina

Areas for Future Coordination, Planning, Action:

- *Simplified Contact Information- Signals, project status*
- *Plan Review, Developmental Standards*
- *Traffic Impact Analysis Recommendations*
- *Highway 521 / Major Widenings*

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Lancaster County
South Carolina

County Council Retreat
Proactive Policy Making for 2050

SC Infrastructure Bank Grant Status

Tim Greene

January 29, 2026

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SCDOT Countywide Roads Update

South Carolina Transportation Infrastructure Bank

Rural Project Program



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SCDOT Countywide Roads Update

Lancaster County South Carolina

Background

- The South Carolina Transportation Infrastructure Bank (the Bank) committed $250 million to the Rural Project Program over the next ten years. The Rural Application will provide financial assistance to rural projects not to exceed $50 million.
- The Bank will evaluate the applications and projects which are determined to be eligible and qualified based on the Bank's rural application criteria, the Bank's Operating Guidelines, the South Carolina Transportation Infrastructure Bank Act.
- The projects approved for financial assistance by the Bank will be submitted for review and consideration to the SCDOT Commission and the General Assembly's Joint Bond Review Committee. The Bank will notify all applicants of final decisions

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SCDOT Countywide Roads Update

Lancaster County South Carolina

Process

- The Rural Application round opened March 15, 2025, through June 13, 2025
- In May 2025 Council Approved resolution #1295-R2025 authorizing our application to the SC Transportation Banks Rural Project Program in pursuit of the US Highway 521 Widening.
- Also in May, County Administrator signed an agreement with our on-call engineers, Bolton & Menk to assist with preparation of the application.

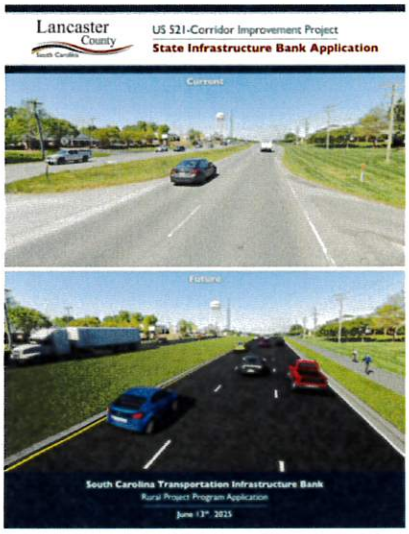
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SCDOT Countywide Roads Update

Lancaster County South Carolina

Application

- Submitted on June 13, 2025
- Application includes…
  - Executive Summary
  - Benefit
  - Financial Plan



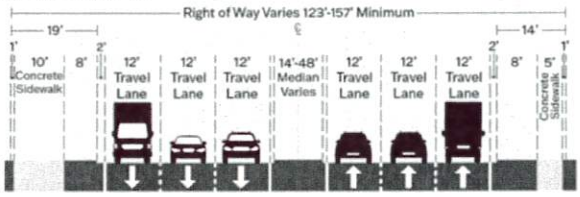
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SCDOT Countywide Roads Update

Lancaster County South Carolina

Executive Summary

- The project seeks to widen a 2.25-mile portion of the corridor.
- The proposed improvements encompass numerous studies and preliminary engineering completed by the Rock-Hill Fort Mill Area Transportation Study (RFATS) and Lancaster County to best determine project alternatives, identify safety concerns, and prepare for future growth.
- The need for these improvements has already been recognized and addressed on the North Carolina side of the state border by NCDOT Project U-6109, which aims to widen US 521 to five lanes as part of the NC State Transportation Improvement Program (STIP).
- Public benefit areas as project outcomes and ranks the respective benefits as follows
  - Enhancement of Mobility and Safety
  - Promotion of Economic Development
  - Increasing Quality of Life and General Welfare of the Public



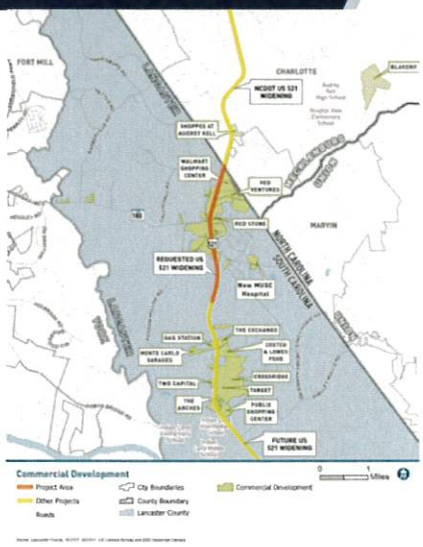
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SCDOT Countywide Roads Update

Lancaster County
South Carolina

Local Resolutions

- Lancaster County Council
- Rock Hill-Fort Mill Area Transportation Study (Director and Vice-Chair)
- Catawba Regional Council of Governments (Exec. Director)
- Lancaster County Economic Development Board (Board Chair)
- Lancaster County Transportation Committee (Chairman)
- SCDOT (Secretary of Transportation)



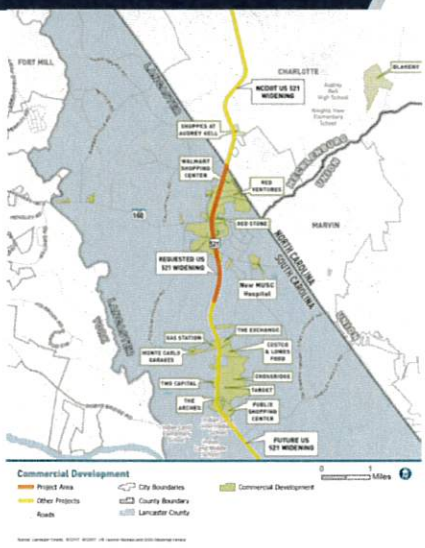
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SCDOT Countywide Roads Update

Lancaster County
South Carolina

Cost

The Financial Plan section addresses each item listed in the application criteria and shows a **project cost of $51.86 million**, of which Lancaster County will provide **$9.66 million in local funding (19% match).**



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Lancaster County
South Carolina

4. Discussion Items

c. Planning Forward: Preparing for Growth Through 2050 – *Allison Hardin / Brian Fulk / Chris Clouden / Stephany Snowden*

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Lancaster County
South Carolina

County Council Retreat
Proactive Policy Making for 2050

Planning Forward

Allison Hardin

January 29, 2026

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Countywide Planning Forward Map

The attached Map interactive map was created to help illustrate potential park, green, and recreation spaces.

It includes layers for census tracts, existing Lancaster County facilities, current parks, floodways, residential subdivisions, and the Future Land Use categories from the 2040 Comprehensive Plan.

https://lancogis.maps.arcgis.com/apps/instant/interactivelegend/index.html?appid=b9eab62634834edf81d166ee98f1dad9

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2026 County Council Retreat
Proactive Policy Making for 2050

Economic Development
"A case for more industry and more revenues"

Brian Fulk

January 29, 2026

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Property Tax Revenues: A Main Source of Future County Revenues

- Net Property Taxes for Lancaster County for the year ending June 30, 2025 were $63,800,000. This represents, at 66%, the majority of all revenues collected by the County from all sources. Nothing else comes close in terms of a single revenue category being more important to serving the County's needs.

Importantly, versus most other County revenue sources, the Property Tax revenue line is one category where we can make strategic development decisions today, and over the next nearby years, that will have significantly positive medium-term and distant future outcomes.



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A Strategic Policy Question

How do we best address the strong demand for more residential housing, and the County's servicing expenses associated with these new and existing residential properties, while also placing additional team focus, and County financial resources, towards expanding the County's industrial/commercial property tax revenue base; giving these businesses time to start making an important offsetting positive financial impact to the negative financial yield of residential property for the County?

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Economic Facts To Boast About!

- Lancaster County's GDP exceeded **$4.7 billion** for the first time. At the current GDP level, **Lancaster ranks 17th of South Carolina's 46 counties.**
- The median household income in Lancaster County continues to grow, and is now at **$74,000**, over 50% higher than the state median of $48,000.



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And we are very proud of this!

- Good schools...good teachers with modern facilities.
- Safe Environment.
- Public recreational facilities for all ages.
- Golf, Tennis, Pickleball, Biking, Walking, Swimming, Horseback Riding, Sporting Clays, and more are available in the area.
- Cultural activities.
- Classes in dance, cooking, art and more.
- Community events throughout.
- Improving an already **Good Quality of Life.**



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Population Growth

Lancaster County South Carolina

Annualized Population Growth Estimates for Selected S.C. Regions

Source: U.S. Census Bureau & SC Office of Revenue & Fiscal Affairs Projected

Region	Annualized Pop. Growth (2010-2023)	Annualized Pop. Growth (2023-2040)
Chester County	-0.3%	-0.2%
Chesterfield County	-0.6%	-1.1%
Fairfield County	-1.3%	-2.5%
Kershaw County	+0.8%	+0.7%
Lancaster County	+2.6%	+2.3%
York County	+2.2%	+1.9%
South Carolina	**+1.1%**	**+1.0%**

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Population and Projections to 2050*

Lancaster County South Carolina

- 2020 Census: 96,011 residents
- 2025 Current Estimate: 111,652 residents
- 2035 Projection: ~128,294 residents
- **2050 Projection: ~192,275 residents**

*Projections assume no residential development moratorium

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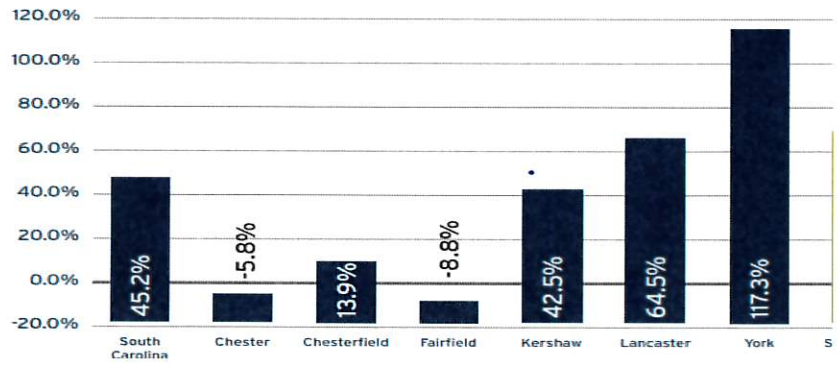
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Good News! Employment Growth Has Been Strong

Lancaster County South Carolina

Figure 2 **Cumulative Employment Growth, 1990-2024**

Source: U.S. Bureau of Labor Statistics, LAUS, September 2024



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County Assets—Why is everybody coming here?

Lancaster County South Carolina

- Proximity to a large growing metro
- Proximity to an international airport
- Good road, highway and rail transportation systems
- Good public and private schools in the region
- Safe environment
- Lower property taxes for most inbound residential population
- Ample talented workforce
- Workforce training
- Lower average wages
- Lower cost of operating a business
- Quality of Life
- And More!









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Lancaster County Vision

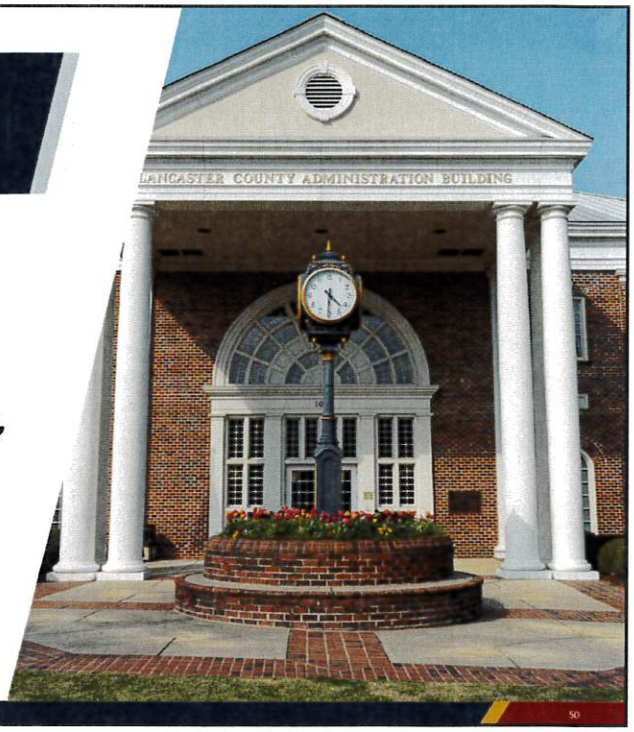
Lancaster County will be a **network of thriving communities offering the highest quality of life in the Carolinas.**



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Lancaster County Mission

Our Mission is to enhance our community's quality of life by enabling people to live, learn, work, worship, play, and grow – both personally and professionally.



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Lancaster County Mission… Digging Deeper

Lancaster County is a people-friendly and safe location, welcoming families, singles, young and older adults, students, employed and retired individuals, **and offering a variety of residential housing options,** with excellent access to state-of-the-art routine and emergency healthcare; **along with right-fitting businesses, appropriately located, to provide sustainable higher-paying jobs and, especially, to provide the core funding for the services that residents, tourists, visitors, workers and others need within the County well into the future.**



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Two Paths Counties May Take: *Residential Growth*

Lancaster County South Carolina

Residential growth, in attractive areas, almost seems to occur naturally, and without much encouragement required. Especially in rural and suburban counties, like Lancaster County, located nearby a rapidly growing large metropolitan area, rapid residential growth is the normal development route seen all across the USA.

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What Happens In A Typical County With High Residential Growth?

Lancaster County South Carolina

- **Rapid housing approvals**, often stretching staff.
- Schools, roads, EMS, Fire, and Law Enforcement **services must expand**.
- **Revenues** from new residential developments **lag behind the county's expenses, and equipment investments,** for the services needed.
- Left unchecked, without property tax revenue-producing businesses growing alongside the residential expansion, a high residency growth scenario will likely lead to eventual **residential tax increases, or perhaps the need to borrow funds to pay for current and future ongoing needs.**





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Residential Growth: Typical County Concerns

Lancaster County South Carolina

- **Every new rooftop brings new residents, requiring law enforcement, fire protection, road maintenance and other services largely provided by the county.**
- **Property tax revenues from an average single-family home fail to cover the cost of the above county-provided services.**
- **With mostly residential growth in any county, future property tax burdens on residents are likely to increase, or cause less county services to be available. For Lancaster County, this residential growth, without a source of other revenue funding, will negatively impact our high quality of life Vision.**

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Residential Growth: The *Fiscal Reality*

- $1 in **residential property tax revenues** compares to a typical county's service expenses of **$1.10 – $1.40** (and this does not include school expenses).
  - *A typical county in the USA will incur expenses to provide services to residential areas up to 40% more than the county takes in from the residential property tax payments, assuming no compensating impact fees or tax adjustments.*

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The Cost of Residential Growth: Bringing Schools into the Equation

In the 2025-2026 fiscal year, the average funding cost per K-12 student in Lancaster was **$15,075.**

In South Carolina, owner-occupied residential homes are exempt from paying any property taxes covering school operating expenses. Homeowners pay $0.00 in property taxes for school operating expenses.

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Residential vs Industrial Tax Yield

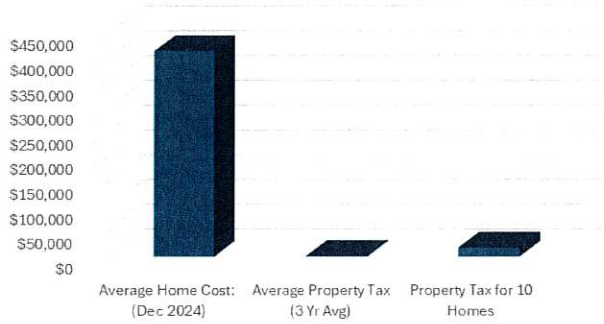
- **Residential Yield:**
  - A typical owner-occupied home in Lancaster pays annual property taxes of **under $2000.00**, leaving a substantial deficit (even without school cost considerations) versus the cost of the numerous services provided by the County. This deficit (excess of service cost to the County vs residential property tax revenue received) must be made-up by other revenue sources. With one home per acre on 10 acres, this hypothetical residential development would generate property tax revenues of just under **$20,000** per annum in property taxes collected by the County.
- **Industrial/Commercial Yield:**
  - An industrial property, also on 10 acres, valued at $25,000,000, contributes roughly **$200,000 to $225,000** annually in property taxes *(depending on FILOT/SSRC agreements that might reduce this)*. The Industrial Tax Yield is as much as 10 times that of a residential equivalent, with much less use of County Services.

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Housing-Property Taxes

- Average Home Price *(Dec 2024)*: $415,267
- Average Home Assessed Value: $298,100
- Average Property Tax *(3 Yr Avg)*: $1859.62
- **Property Taxes for 10 Homes for 1 Year: $18,596.20**



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Two Paths Counties May Take: *Expanding Industry*

Lancaster County South Carolina

Today, with more than 3000 other counties competing in the USA for investments, today's industrial projects require and demand extensive site preparation creating a site deemed "build-ready" *(surveys, environmental studies, land clearing, land grading, and infrastructure all completed)*.

Most new projects want to build as soon as possible, and cannot wait for grading and infrastructure.

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Industrial Property Taxes

Lancaster County South Carolina

- 50,000 sq ft. Building on 10 Acres w/ $25 Million Investment.
- 6% tax rate and Millage 345.5 mills.
- **Estimated Annual Industrial Property Taxes: $225,000**



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A Focus on Expanding Industry: A Clear Fiscal Advantage

- $1 in industrial taxes paid costs only ~$0.30 in services.
- Industry and Commercial property taxes produce significant surplus funds, equal to approximately **$0.70 cents per $1** in revenues collected.

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Ideal "TEXTBOOK" 1-2-3 County Sequencing

1. **Invest in land preparation (and, with partners, infrastructure) to attract and create an industrial and commercial property tax revenue base.**
2. **Residential developments come next, to allow people to move nearer to new employment opportunities.** Most people prefer to live and work in the same area without having a long commute.
3. **Retail and consumer services follow jobs and residential growth.** These follow-on retail businesses and services also create good jobs, with a wide range of wages. The retail component also provides much-desired sales tax revenue as well (Costco and Target will be good examples to watch).

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Results of Ideal Sequencing for a Typical County

Lancaster County South Carolina

- **Adds early strength and stability to the property tax base.**
- **Funding for future schools becomes largely provided by businesses.**
- **Helps with the important goal of increasing jobs within the county for our residents and others.**
- **Creates an local ecosystem where "lunch money expenditures," and lunchtime and early evening purchases, occur in the county.**
- **Reduces commuter traffic leaving the county, making roads a bit safer.**
- **A strong future county financial position is virtually assured.**

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Bottom Line Recommendation: Let's Galvanize Our Industrial Growth Strategy

Lancaster County South Carolina

- **Make** near-term site improvement investments in existing County-owned industrial properties in order to attract new industry, and thereby providing tax revenues and employment.
- **Strengthen** the business property tax base with new onboarded employers.
- **"Guide"** housing to follow new jobs.

The ideal sequence, ***not always possible***, creates **financially-balanced communities** with a **steadily growing** and **dependable tax base**, assuming a diversified range of businesses.

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County-owned Industrial Assets

Lancaster County
South Carolina

1. **Lancaster County Airport**
2. **Lancaster County Air Rail Business Park**
3. **Lancaster County Business Park**
4. **Heath Springs Business Park**





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The Catawba River



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Is Water, Water, Everywhere?

Lancaster County South Carolina

- Our drinking water (tap water) source is the Catawba River.
- The Catawba River, including sections in Lancaster, has faced significant endangerment due **mainly to polluted runoff; a consequence of residential development stormwater and agricultural runoff**, leading to it being named as one of the state's endangered rivers.
- A restriction we operate under now in Lancaster is that the maximum additional wastewater capacity for the entire County area served by LCWSD is 1 million gallons a day. The City of Lancaster and some towns (Heath Springs and Kershaw as examples) in the County have a greater supply, either by way of contracts with LCWSD, or being served by another provider.
- **Lancaster's wastewater capacity limit has impacted, and will impact, some industrial growth opportunities.** To maneuver around this, we have focused on, and will continue to focus on, recruiting new operations that are not viewed as wastewater intensive.

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"That's Life!" Let's deal with it and move forward

Lancaster County South Carolina

- **Lancaster County does not own or control the utilities it depends upon.** This will sometimes result in a disconnect between the needs of a county-wide industrial growth focus, and the ability to service those areas by our utility providers. **Utilities typically follow new industrial projects rather than anticipate areas of growth and proactively add capacity.** It's an understandably safer financial strategy for them. However, from our side, with a two-year buildout for a new large project needing high electricity capacity, or larger wastewater capacity, almost all such investors look elsewhere for assets ready to build upon immediately.
- **Presently, Duke Energy has an additional 7-10MW of electricity capacity** for most of Lancaster County, enough to power several 50,000 sq ft manufacturing facilities. On the other hand, as a comparison, a Data Center would need 300 MW at full capacity.
- **We are a Tier II *("Moderately Developed")* County** along with: Aiken, Anderson, Calhoun, Edgefield, Georgetown, Jasper, Newberry, Pickens, Richland and Saluda. Chester County is a Tier III and York County is a Tier I. **Companies locating to Lancaster County can only receive SC State Job Tax Credits of $2,750** per job versus a Tier III County (Chester County) at $20,250.
- Recent studies show **more than 50% of the workforce living in Lancaster County, work outside the County.** These 25,000+ commuters are spending some of their disposable money elsewhere, otherwise known as "financial leakage." The County loses some revenue here that could be used to offset future taxes, or help with existing county expenses. And keeping money circulating in the County has a positive multiplier impact.

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Summary For Consideration

Lancaster County South Carolina

- The County would benefit from having significantly more industrial and office employers in Lancaster, as these businesses will contribute to the costs for the County services needed by residents. Also, more jobs in the County may help reduce the significant outbound commuter traffic now occurring.
- According to the field of knowledge available on Economic Development, we need to focus on and deal with what we can control as to our industrial county-owned assets. In the modern and rapidly changing world we now live in, this means **having most of our sites "ready to build upon."** We should also try and expand the pace to improve the land we own, which is already designated for industry development.
- And, between right now and the next few years, we will want to consider acquiring more industrial land (or other land to be designated for industry), **even if there are no immediate plans or funding to develop.** Availability of suitable property will continue to shrink and land prices will rise. More on a later slide.
- Allow or encouraging certain properties to be rezoned to Light or Heavy Industrial without a change in taxes for the current owner.
- Today we have 7% of the entire county public and privately-owned acreage devoted to industry, suggesting that there is physical room for growth.

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Improvement Estimates For Consideration

Lancaster County South Carolina

- **Heath Springs Business Park:** Land clearing, grading, and the paved road to cost an estimated **$2.0MM**
- **Air Rail Park:** Clearing and Grading of Lot 7, approximately 29 acres in total with 15 plus developable. Est. **$2.0MM**
- **Air Rail Park:** Extend the road into and possibly beyond lots 4 and 5 (awaiting an industry to locate here on our ready 20-acre site). **Est $1.5MM**
- **Air Rail Park:** Site work at Lot 3, 10 acres, to make it build-ready for a 50K sq.ft structure**. Est. $1.5MM**

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Why More Land?

Lancaster County South Carolina

- The available land, zoned LI or HI, is limited in the County.
- The textbook problem with housing locating nearby an area zoned for industry, even if such zoning has been in place for decades, is residents will object to a nearby industrial facility...and even if the original intention was for the industrial site to be the focus and the priority. Residential growth near unimproved (and improved) industrial sites can slow, or stop, much needed future industrial and commercial growth.
- Owning land, possibly otherwise at risk and eventually destined to be rezoned from Industrial to Residential, will keep a County-controlled placeholder for industry to locate. In these areas, we can also better control which companies are "right-fitting" to locate here.
- Twenty-five years from now, the then leaders of Lancaster County will be appreciative of the foresight taken in the next few years to better prepare and build the financial engines to fund and reach our Vision.

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Why More Land?

Lancaster County South Carolina

There is no privately-held industrial property of any significant size in Lancaster County that is build-ready, other than land now attached to existing operations. We have people looking for 10 acres of industrial land and cannot find it.

There is no county-owned land south of the City of Lancaster that is build-ready. Thus, our current focus on making a site ready at the Heath Springs Business Park. Comporium recently contributed $165,000 to help us with this project.

We have only one site at the Air-Rail Park that is "build-ready." The site is zoned Light Industrial, which some argue is incongruent with being adjacent to the L&C Railroad. Rail here is used substantially by Heavy Industrial users located outside Lancaster.

The existing expansions we are seeing with local companies are largely on sites they now operate on. This works for the first expansion. **But, where do our existing companies go next when they desire to expand again?**

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Possible Land to Analyze

Lancaster County South Carolina

- **Airport**
  - *Future Hanger Needs?*
- **Fosters Crossroads Industrial Site**
  - *This is the land now zoned HI. The acreage size in total is over 1000 acres, but smaller tracts are possible (350 acres as a target?). To our knowledge, there has never been any environmental and related studies performed on this property, and that would likely need to be done at our expense.*
- **Land across the railroad track at the Air Rail Park**
  - *This property would be more attractive to a new industrial investor if it can be designated as a HI property, or a "LI plus" property. Rail here is very valuable asset, but rail and natural gas are more consistent with heavy industry usage. This land has not been evaluated with preliminary environmental and related studies.*
- **Other properties**

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Becoming "One Lancaster County"

For the Vision and Mission to be realized, County employees, *especially those engaging directly with a business customer, or a customer's business projects,* ***will want to support the need and current efforts to recruit, and bring "On Board" property tax revenue-producing industrial and commercial properties.***

These businesses, both large and small, will provide significant future property tax funding for the County, allowing the County to continue to provide and further expand the services needed, and desired, by our residents. Excess funds can be used for improving the quality of life for our citizens.

These businesses will also bring much needed employment opportunities into the County. And, if history is any indication, once new companies locate here, they tend to expand here.

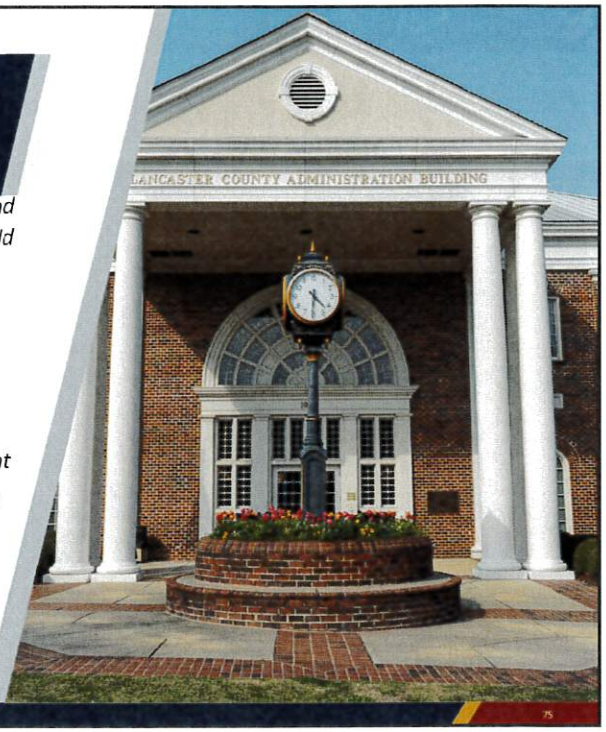
More County revenues will also benefit County employees, the County's most important asset.



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Determine the Key Goals for the "One Lancaster County" Team



1) Provide *the expected County government emergency, support and other services that citizens need, if not more, and "do it as you would want" to have such experience.*

2) Contribute *to and support business growth in order to remain financially healthy and sound today, and in the future; all without placing a heavy tax burden on owner-occupied residential property taxpayers.*

3) Help *Lancaster County and its Economic Development Department attract new investments and create new employment opportunities, with higher paying wages, for citizens residing in the County.*

4) Keep *the County clean from liter and blight, and work to create our vision…citizens enjoying* ***"the highest quality of life in the Carolinas."***

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A Strategic Policy Question

Lancaster County South Carolina

How do we best address the strong demand for more residential housing, and the County's servicing expenses associated with these new and existing residential properties, while also placing additional team focus, and County financial resources, towards expanding the County's industrial/commercial property tax revenue base; giving these businesses time to start making an important offsetting positive financial impact to the negative financial yield of residential property for the County?

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Questions/Guidance?

Lancaster County South Carolina

Discussion

Brian Fulk, Lancaster County Economic Development Director

bfulk@lancastercountysc.gov

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Lancaster County South Carolina

County Council Retreat Strategic Priorities

Parks and Recreation: Planning for Quality of Life

Chris Clouden

January 29,2026

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Parks and Recreation



Property Overview

23 properties

- 39 fields: 22 diamonds & 17 rectangular
- 11 playgrounds
- 6 picnic shelters
- 6 tennis courts
- 5 miles of trails
- 4 recreation centers
- 2 walking tracks
- 1 fishing pier & boat ramp

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Parks and Recreation

Lancaster County South Carolina



Parks and Recreation		
Year	**Participants**	**Spectators**
FY 2019	4,919	N/A
FY 2020	3,817	N/A
FY 2021	4,856	N/A
FY 2022	3,751	9,925
FY 2023	5,430	12,465
FY 2024	7,157	14,690
FY 2025	9,234	18,260

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Parks and Recreation

Lancaster County South Carolina

Facility & Land Needs

- Passive green space
- Rectangular fields
- More land in Indian Land
- Outdoor courts
- Trails







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Parks and Recreation

Lancaster County South Carolina

Opportunities

- Land acquisition
- Field development fund
- Underutilized properties
- Public/private partnerships
- Grants

NRPA



LAND & WATER CONSERVATION FUND

US Youth SOCCER FOUNDATION

USTA

www.lancastercountysc.gov

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Lancaster County
South Carolina

2026 County Council Retreat
Proactive Policy Making for 2050

Lancaster County Property Update

Stephany Snowden

January 29, 2026

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County Leases

Lancaster County
South Carolina

Property/Use	Address	Lessee/Lessor	Payment Amount	Lease Began	Lease Ends
Wylie Street Pool	116 S Wylie St	City of Lancaster	20,000/year		
Airport Field Mowing	286 Aviation Blvd	Danny Wright	Care in Lieu of Pmt	10/1/2022	9/30/2032
EMS/Fire Rescue	111 Covenant Place	The American National Red Cross	$1/year	3/15/2012	
Hangers	286 Aviation Blvd	Blue Sky Properties/LKR Hangars	$2,100/year	11/6/2008	11/5/2033
Clemson Ext - Davis House	208 W Dunlap St	Clemson Extension	$0/year	9/1/1986	
Women's Enrichment Center Storage	Building Office Space (Old Pharmacy)	Women's Enrichment Center		12/9/2025	12/9/2026
George Katsanos Sheriff Substation	1821 Sandalbrook Rd	Lancaster County	$3,425/month	7/1/2024	6/30/2029
Race Track Site	Shiloh Unity Rd	Lancaster County	$2,500/year	7/1/2023	6/30/2028
Fort Site	JB Denton Rd	Lancaster County	$600/year	7/1/2023	6/30/2026

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County Leases

Property/Use	Address	Lessee/Lessor	Payment Amount	Lease Began	Lease Ends
Tradesville Site	Old Camden Monroe Hwy	Lancaster County	$2,500/year	10/1/2022	9/30/2027
Midway Site	Payne Rd	Lancaster County	$1,400/year	4/30/2022	4/30/2028
Rich Hill Site	Joshua Tree Rd	Lancaster County	$1,200/year	7/1/2017	6/30/2028
Lancaster County Sheriff's Office	1353 Springdale Rd	Lancaster County	$1/year	11/1/1999	
Famers Market	Hwy 9	Lancaster County	$0/year	6/1/1980	
DSS	1595 Pageland Hwy	Lancaster County	$4,620/month	10/1/2025	9/30/2027
IL Service Center	8451 Charlotte Hwy	Lancaster County	$7,138/month	7/8/2017	1/31/2027
Economic Development Building	1033 West Meeting St	Lancaster County Economic Dev Corp	$1/year	7/1/2015	6/30/2020
Mulinax Soccer Fields	635 E Church St, Kershaw	Lancaster County	$1/year	6/17/2019	6/17/2024

85

4. Discussion Items

d. Break

86

Lancaster County
South Carolina

4. Discussion Items

e. Capital Project Sales Tax: Status & Strategy – *Jamie Privuznak*

87

Lancaster County
South Carolina

2026 County Council Retreat
Capital Project Sales Tax

January 29, 2026

Ginny Merck-Dupont, County Attorney
Jamie Privuznak, Budget Director
Jenna Woods, Communications & Marketing Director

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Agenda

1. Receive background and a project update
2. Discuss the public education component and communications strategy
3. Determine future policy direction



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Capital Project Sales Tax: Background

- Is a local Sales & Use tax and is defined in the **State's Sales & Use Tax Index**
- The State's Sales & Use Tax is imposed statewide on all retail goods and certain services.
- South Carolina allows counties to impose an **additional and optional 1% local Sales & Use** tax if county voters approve
- Lancaster County voters approved two 1% local options: the Local Option Sales & Use and **Capital Projects**
- Break-down of Lancaster County's Sales & Use Tax Rate:

Statewide Rate =	6%
Local Option Sales & Use Tax =	1%
Capital Projects Tax =	**1%**
Total Sales & Use Tax Rate =	8%

- South Carolina Department of Revenue collects and distributes the tax receipts to counties

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Capital Project Sales Tax: Defined

Lancaster County South Carolina

- A 1% optional and additional Sales & Use tax in Lancaster County (Enabling Act: SC Code Sec 4-10-300)
- Paid by residents and non-residents at point-of-sale
- Must be approved by voter referendum before its imposed
- Imposed countywide for seven years
- 1% is dedicated for specific capital projects (i.e., roads, bridges, public facilities, recreation facilities) that are approved by voters on a ballot
- County Council creates a Commission, via resolution, to formulate ballot questions for referendum
- Lancaster County imposed tax in 2009 and reimposed in 2015 (CPST2) and in 2022 (CPST3)

91

Capital Project Sales Tax 3

Lancaster County South Carolina

Enacting Ordinance Number 2020-1673:

- Voters approved = $68,092,276
- For 14 capital projects
- Over 7-year period from 05/1/2022 - 04/30/2029
- Includes approval to borrow for Detention Center facility, Magistrate's Office, and land acquisition
- Currently in Year 5 of 7-year period

JP1

CPST3 Account	Cumulative Total May 2022 to December 2025
Total Revenue Collected	$58,698,372

92

Slide 92

JP1 @Sabrena - comment that the total - a portion of - is reimbursable by the bonds.
Jamie Privuznak, 2026-01-22T15:22:11.545

Capital Project Sales Tax 3

Lancaster County South Carolina

CPST3 Project Name	CPST3 Voter Amount Total	Revenue Distribution	Project Status	Notes
Lancaster County Detention Center*	30,133,800	30,133,800	In Progress	Includes principal, interest, and admin payments for project
Road Rehabilitation and Resurfacing	13,229,719	JP1 13,229,719	In Progress	Includes contract services, County road paving projects, and State road resurfacing projects
Lindsay Pettus Greenway Phase 2*	1,500,000	1,500,000	In Progress	For construction phase for Perception Buildings as of November 2025 Funding: partially paid
EMS Station 7 – Heath Springs	1,800,000	1,800,000	In Progress	Budgeted amount in FY26; Bid forthcoming (Planning)

JP2

*Project is partially funded with CPST3 revenue

93

Capital Project Sales Tax 3

Lancaster County South Carolina

CPST3 Project Name	CPST3 Voter Amount Total	Revenue Distribution	Project Status	Notes
Airport – New Hangar*	900,000	900,000	In Progress	Budgeted amount in FY26 – Terminal project moved start date for hangar (Planning)
EMS Station 10 – Van Wyck	1,800,000	1,800,000	In Progress	Budgeted amount in FY26; Bid forthcoming (Planning)
Educational Foundation of USC Lancaster*	1,000,000	1,000,000	Not Started	Construct health facility for Nursing Program Funding: Ready to draw down
City of Lancaster – Gay Street Commons	1,500,000	1,500,000	Not Started	Streetscape improvements for Downtown Revitalization Plan Funding: Ready to draw down
Town of Kershaw – Old Bank Building*	1,000,000	1,000,000	Not Started	Renovation Early Childhood Education Center Funding: Ready to draw down

*Project is partially funded with CPST3 revenue

94

Slide 93

JP1 Monique - What is happening here
Jamie Privuznak, 2026-01-20T19:21:16.220

JP1 0 [@Sabrena Harris], Is this fair to say that we spent all we can spent on the CPST3 revenue, so now the difference is picked up by the bonds
Jamie Privuznak, 2026-01-22T15:16:35.049

JP1 1 [@Sabrena Harris], We need to talk to you about how to present this.
Jamie Privuznak, 2026-01-22T15:16:56.798

1 2 ok
Sabrena Harris, 2026-01-22T16:55:39.525

JP2 From HWY 9 pedi project ask Monique and Jeff about this one and CPST2???
Jamie Privuznak, 2026-01-20T19:35:45.445

JP3

Capital Project Sales Tax 3

Lancaster County South Carolina

JP1

CPST3 Project Name	CPST3 Voter Amount Total	Revenue Distribution	Project Status	Notes
		STOP		
Rock Hill – Fort Mill Transportation Study – HWY 521 Widening	9,660,000	-	Not Started	Widening Marvin Road to NC State line Funding Projection: Ready to draw down at next quarterly distribution from State
USC Lancaster – HWY 9 Pedestrian Connections*	1,000,000	-	Not Started	Pedestrian and bike crossings on HWY 9 (FY27 Q1)
Town of Van Wyck – Community Park	647,640	-	Not Started	Facilities located at Van Wyck Community Center (FY27 Q1)
Lancaster County – Parks & Recreation Walnut Creek Park soccer field improvements	1,000,000	-	Not Started	Natural to synthetic turf improvements on 2 soccer fields (FY27 request)
Council on Aging – Indian Land Senior Center	2,921,117	-	Not Started	Land acquisition and construction (FY27 Q1)
Totals:	**$68,092,276**	**$52,863,519**		

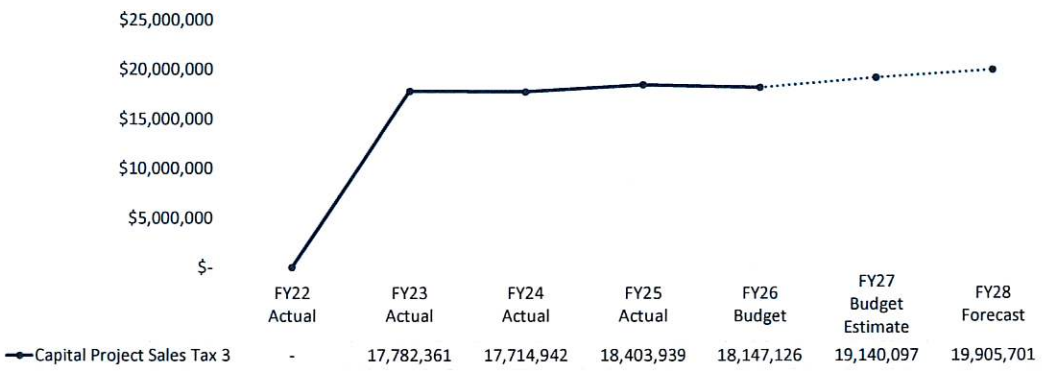
*Project is partially funded with CPST3 revenue

95

Capital Project Sales Tax 3 – Preliminary Forecast

Lancaster County South Carolina

Methodology Economic conditions, growth in retail space, population, individual/family buying capacity



Note: FY26 actual is $4,797,129 as of December 31, 2025.

96

Slide 95

JP1 Steve is saying that this was funded with CPST2 dollars in his email - I cannot find this...
Jamie Privuznak, 2026-01-16T19:57:42.246

JP1 0 Jeff???
Jamie Privuznak, 2026-01-16T20:31:12.667

JP1 1 Do we think a check was cut for this and posted to the road and rehab State
Jamie Privuznak, 2026-01-22T15:49:38.611

JP2 Did we wire HWY9 and council on aging IL Monique
Jamie Privuznak, 2026-01-22T15:39:31.699

JP3 Did we pay the Town of Kershaw
Jamie Privuznak, 2026-01-26T15:45:54.234

Capital Project Sales Tax 2

Lancaster County South Carolina

Enacting Ordinance Number 2014-1286

- Voters approved = $41,738,000 total to raise
- For four capital projects
- Over seven-year reimposition period
  - 05/01/2015 - 04/30/2022
- Includes approval for borrowing for roads and communications system
- Status = Collections Complete

CPST2 Account	Cumulative Total May 2015 to April 2022
Total Revenue Collected	$71,533,616
Distribute Revenue to Projects	(41,738,000)
Total Excess CPST2 Collected:	**$29,795,616**

97

JP1

Capital Project Sales Tax 2

Lancaster County South Carolina

JP2

CPST2 Project Name	CPST2 Voter Amount Total	Revenue Distribution	Status	Notes
Road improvements and resurfacing for County and State-owned roads	26,000,000	26,000,000	Complete	Complete but for Cleveland Street and Rise Lane projects
Public safety and emergency communications system	7,500,000	7,500,000	Complete	
Library improvements	8,000,000	8,000,000	Complete	
Sheriff's Office Forensics Crime Lab	238,000	238,000	TBD	Pending further review
Totals:	**$41,738,000**	**$41,738,000**		

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Slide 98

JP1 Monique - I believe these projects are completed because this is why we are able to use the reserves for the road projects. Could you confirm yes - to your knowledge
Jamie Privuznak, 2026-01-16T19:16:22.902

JP2 It could be here - Hwy 9 pedestrian improvements per the CPST2 Provisio - Mo is searching
Jamie Privuznak, 2026-01-22T16:10:16.591

Excess CPST2 Revenue & the Proviso

Enacting Ordinance Number 2022-1796

JP1

- Project priority order for excess funds per Proviso
  - County Library = Complete
  - Cleveland Street and Rise Lane = In progress
  - Hwy 9 – USC Lancaster Pedestrian Improvements = Not Started
  - Lindsay Pettus Greenway, Phase 2 = In progress
  - Lancaster County Detention Center = In progress

CPST2 Account	Amount
Total Excess Revenue	$29,795,616

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Questions



100

Slide 99

JP1 Did Mo wire money for this project out of the Proviso?
Jamie Privuznak, 2026-01-22T21:59:34.239

Lancaster County
South Carolina

2026 County Council Retreat
Proactive Policy Making for 2050

Capital Project Sales Tax Four Timeline / Considerations

Stephany Snowden

January 29, 2026

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Capital Project Sales Tax III

Lancaster County
South Carolina

Lancaster County's current Capital Project Sales Tax III tax took effect May 1, 2022, and expires on April 30, 2029, unless renewed by voters.

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Capital Project Sales Tax IV Considerations

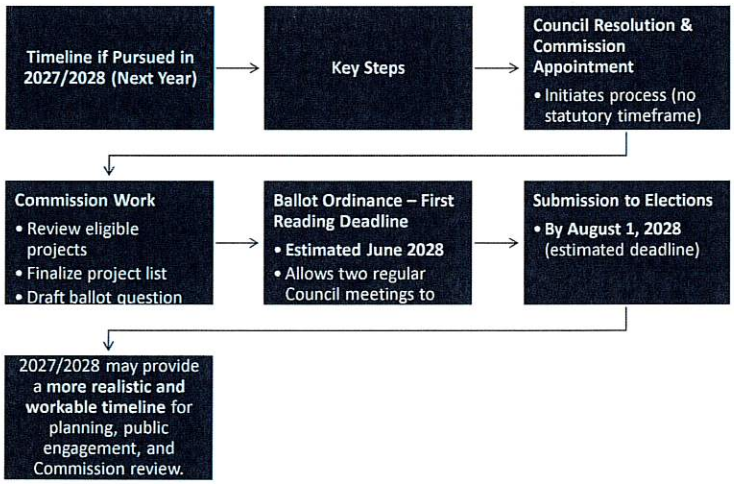
Lancaster County South Carolina

- **Council Considerations for CPST IV**
- To ensure continuity of funding for capital infrastructure and community priorities, Council may wish to begin discussing:
- **Public Education Strategy:**
  - Inform residents about CPST outcomes, completed projects, and remaining needs
  - Clearly communicate the benefits and accountability framework for a potential CPST IV
- **Planning and Timeline Development:**
  - Establish a preliminary planning and community engagement timeline
  - Determine Commission formation, project identification, and ballot development milestones
  - Align with statutory deadlines for a potential referendum vote

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Capital Project Sales Tax IV 2027/2028 Timeline

Lancaster County South Carolina



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Council Guidance and Direction

105

Lancaster County South Carolina

4. Discussion Items

f. Lunch Break

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Lancaster County
South Carolina

4. Discussion Items

g. **Lancaster County Sheriff's Office Briefing – *Sheriff Barry Faile / Major Matt Shaw***

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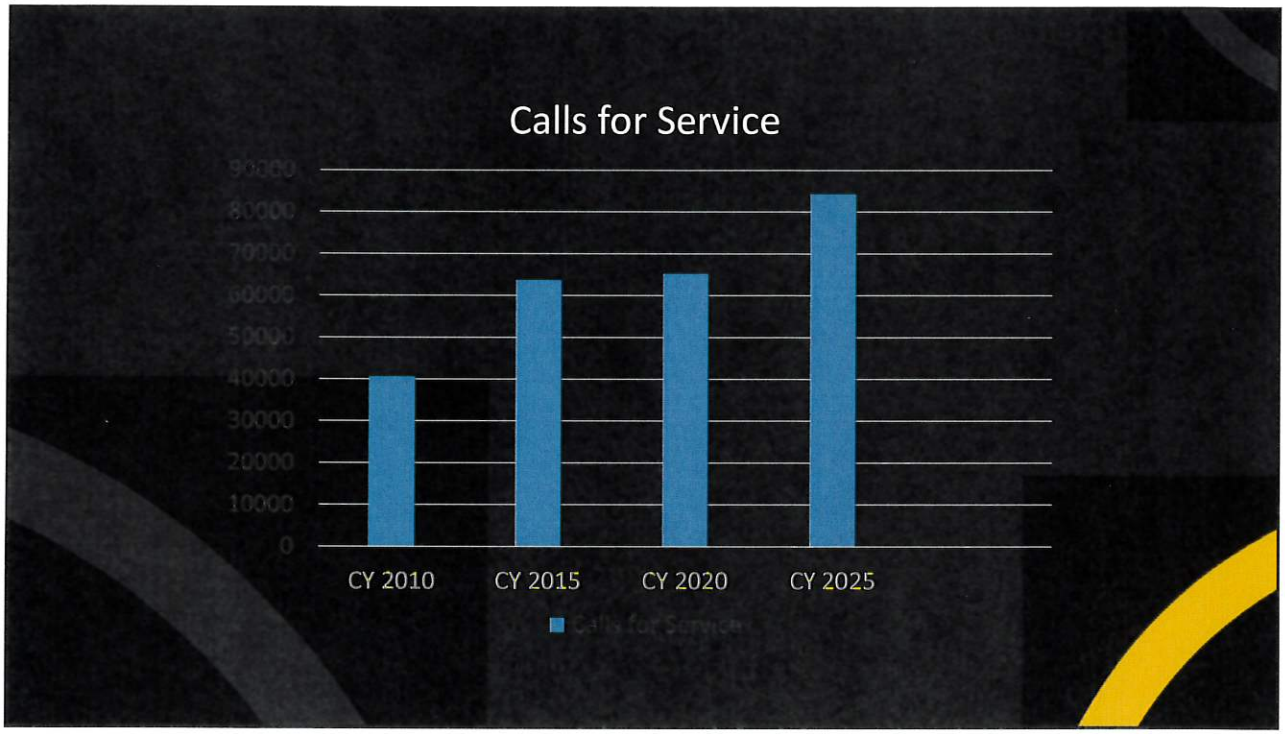
LANCASTER COUNTY SHERIFF'S OFFICE

County Council Retreat

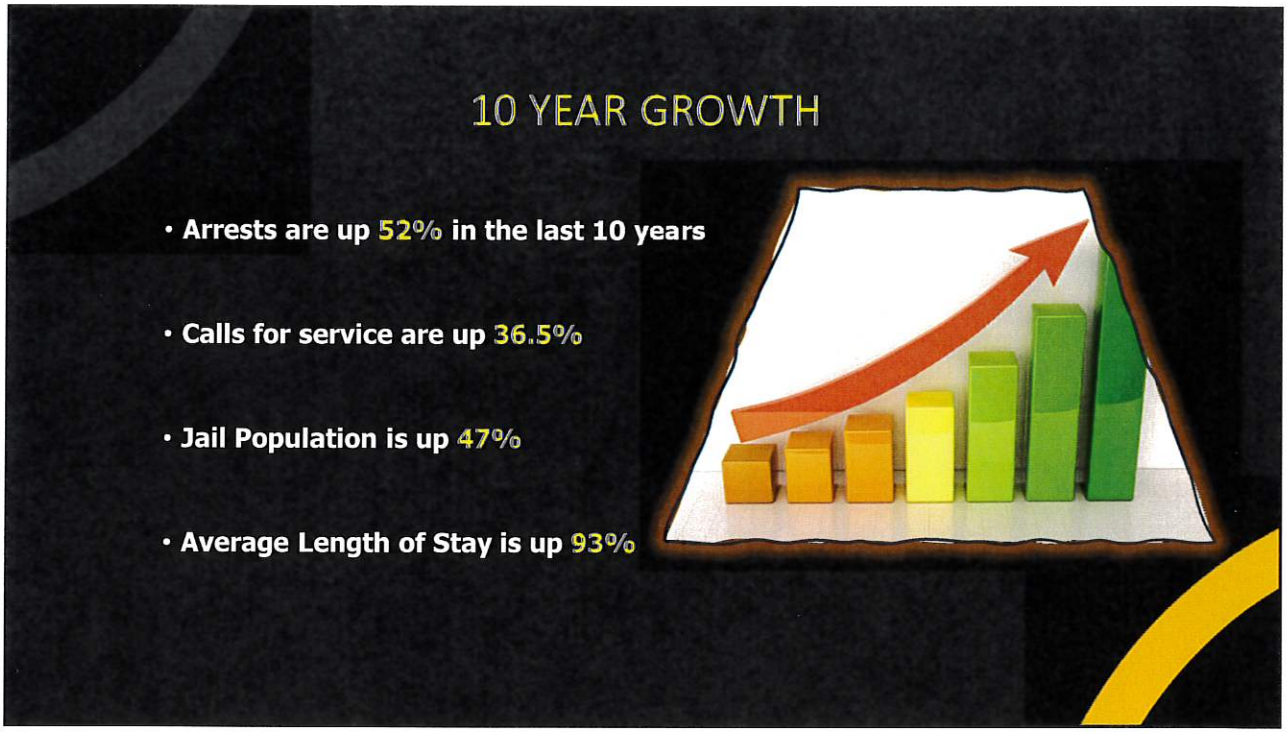
Efficient, Innovative, And Professional

Sheriff Barry S. Faile

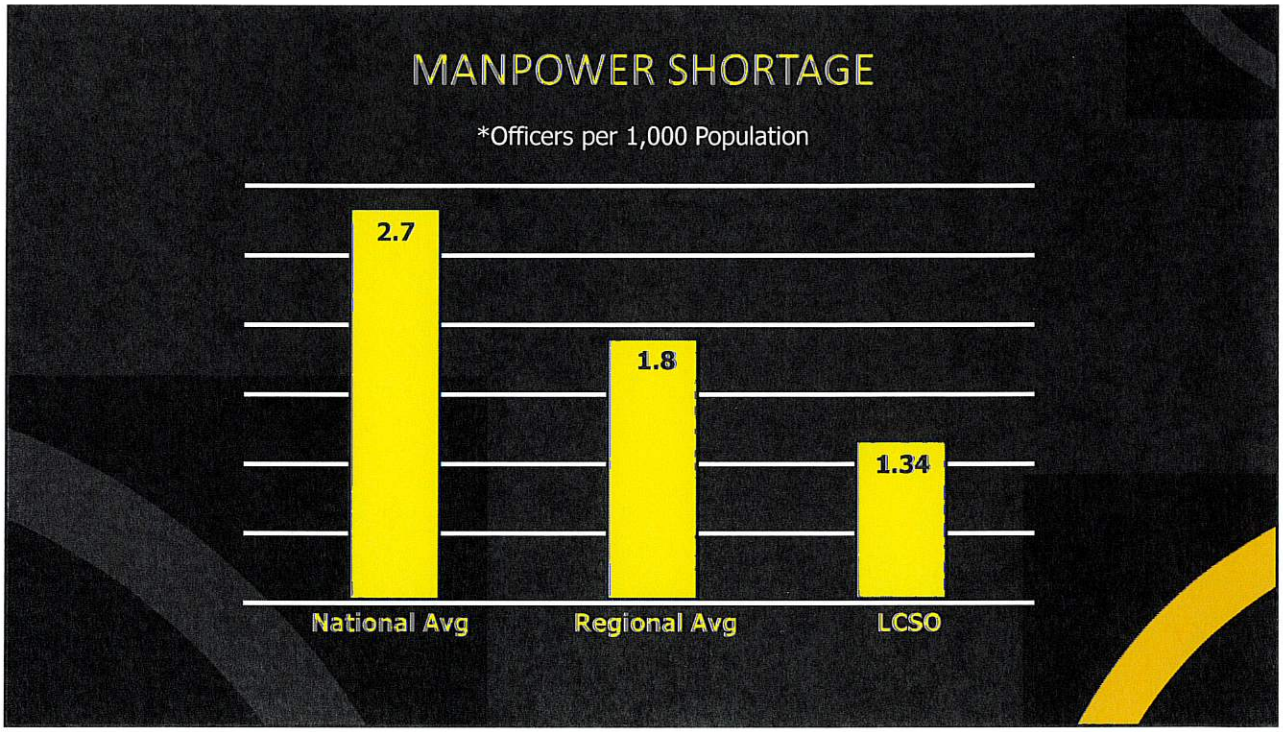
108


Calls for Service
80000
70000
60000
50000
40000
30000
20000
10000
0
CY 2010
CY 2015
CY 2020
CY 2025

109


10 YEAR GROWTH
• Arrests are up 52% in the last 10 years
• Calls for service are up 36.5%
• Jail Population is up 47%
• Average Length of Stay is up 93%

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111

SERVICE POPULATION

Jurisdiction	Service Population	% Served	Officers Per Capita Served
Florence	138,049 84,120	60.9%	1.70
Sumter	146,183 81,825	55.9%	1.82
Chester	32,400 25,261	77.9%	2.76
Lancaster	114,508 104,894	91.6%	1.46

112

FY 27 Budget Priorities

- 24/7 Medical Coverage for the Detention Center
  Estimate cost $910K additional. RFP in process.
- Salary increases to remain competitive
  $607 k @ 5%
- Technology Driven Solutions that work as force multipliers.
  $107k- FLOCK OS/Freeform annually, Cameras $3.5K annually each, Truleo- $74k



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24/7 Medical Coverage

- The current medical coverage at the LCDC is only 12 hours/day.
- This gap in coverage causes a significant strain on both the Sheriff's Office and LCEMS. Medical issues occur 24/7 at LCDC often resulting in transports outside the facility. These transports tie up valuable resources.
- EMS responded 251 times to the LCDC and transported 223 inmates. Deputies transported approximately 180 more.
- Inmate medical care is a significant liability for the county and the root of multiple lawsuits.
- 24/7 Medical reduces liability and frees up valuable EMS and Patrol resources.



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Requested Technology Improvements



- Flock OS and Flock FreeForm
- Additional Flock Cameras
- Truleo AI Assistant

- Each request serves as a force multiplier. These programs allow our personnel to operate more efficiently, eliminating the need for an additional personnel request in this fiscal year.

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FLOCK OS/Freeform/Cameras



- Flock OS/Free Form is a comprehensive platform that will support vehicle recognition, real-time alerts, and data sharing. This program will significantly enhance our ability to detect and investigate criminal activity, streamline communication, and enhance officer safety. Think Real-Time Crime Center.

- Additional Cameras- Flock systems have been instrumental in the resolution of 934 cases over the last 3 years. Including several murder investigations.
- Our cameras avg. 150k-200k vehicle reads a day, resulting in 44k vehicle alerts in the last 3 years.
- Flock led to 93 arrests in 2024 and 172 arrests in 2025

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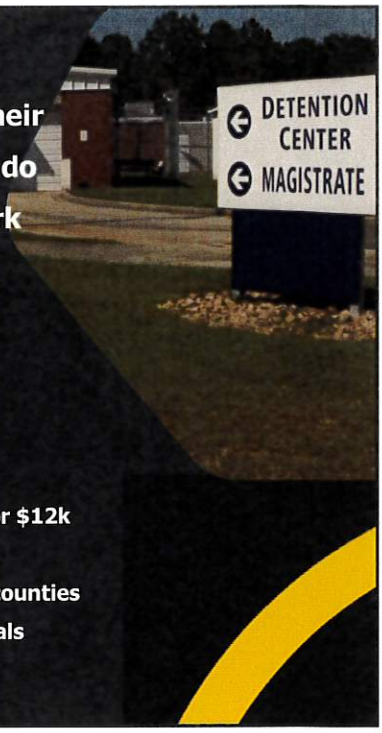
Truleo AI Assistant



- Truleo AI Assistant is a true force multiplier that makes deputies more efficient, more knowledgeable, and more accountable.
- Truleo provides information within seconds (law, policy, RMS) with just a voice prompt.
- Truleo transcribes BWC and Interview video saving deputies hours of work.
- Truleo provides AI assisted report writing saving deputies hours of work.
- Truleo reviews BWC videos and flags videos that are both positive or potentially negative interactions. During our trial it has reviewed 14,588 hours of video.

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Salary Increases



- Surrounding agencies have continued to increase their salaries to compete with our agency. Agencies that do not have the same standards, expectations, and work loads that we do, now offer matching salaries.

Deputy Sheriff	Minimum Salaries
Tega Cay PD	63,110
Mrytle Beach PD	62,088
SCHP	61,622
Rock Hill	61,331
Union County, NC	61,068
SLED	61,000
Chester County	60,971
LCSO	59,487
York County	59,069
Waxhaw, PD	59,000

Detention Center	Minimum Salaries
Union County, NC	61,068
Horry County	60,000
Chester County	57,080
LCDC	56,330

- Greenville County at $57K-asking for $12k across the board increase.
- SCHP- $10K hiring bonus for some counties
- CMPD-$7,500 hiring bonus for laterals
- Columbia PD- $5k hiring bonus

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Lancaster County
South Carolina

4. Discussion Items

h. **Public Safety Briefing – *Clay Catoe / Karla Knight / Robert Purser / Darren Player / Greg Nicholson***

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Lancaster County
South Carolina

County Council Retreat
Proactive Policy Making for 2050

Lancaster County EMS

Clay Catoe

January 29, 2026

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Coroner Update

Lancaster County
South Carolina

Legislative Update - EMS

- Potential OSHA Emergency Service Regulation Requirements
  - Adding testing and training standards
- DPH Regulations Enforcements/Standards Changes:
  - Temperature Control
  - New Skill Level Changes
  - MCI State Plan Update
- Federal Government Shut Down
  - Possible loss of insurance funding or insurance cuts
- 48 Total State Bills Carried Over – 17 Senate and 31 House

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Lancaster County
South Carolina

County Council Retreat
Proactive Policy Making for 2050

Coroner Update

Karla Knight

January 29, 2026

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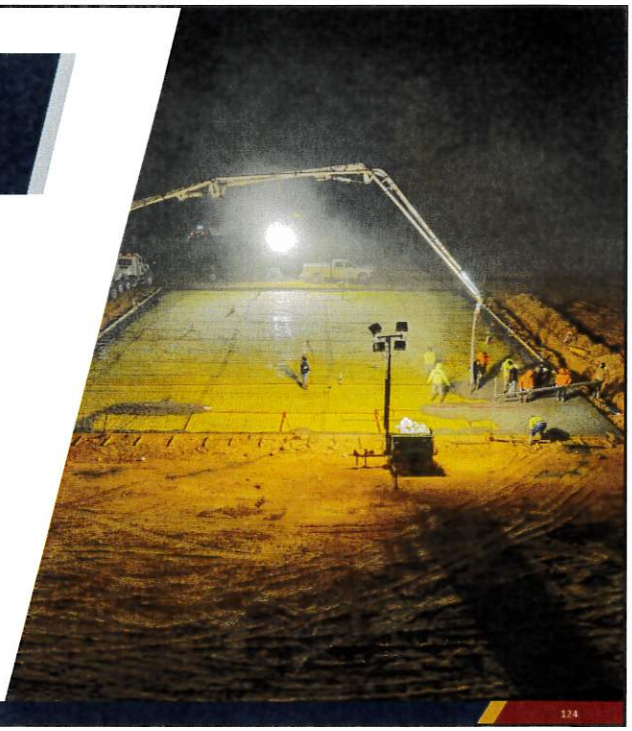
Coroner Update

2022 – ARPA funding awarded

2026 – Project scheduled for completion in December

Key Highlights:

- Expansion from a 9-capacity holding facility to 35, addressing the growing demand driven by population increase.
- Growth is further influenced by the rising number of 55+ communities and senior living facilities being developed within the county.
- Designed and built for long-term growth and capacity for expansion if/when the future dictates so



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Coroner Update

Lancaster County South Carolina

Report Card

- **31% increase** in death rate from 2024 to 2025
- **562 cremation permits issued**, representing **56% of the population** choosing cremation for final disposition
- **496 transports**, an **11% increase** from 2024 – directly correlates with rising case volume
- **Autopsies:** 191 total (only 2 fewer than last year)
- **Drug-related deaths:** Slightly lower than last year (end-of-year cases still pending)
- **Operations:** seven days a week to meet regulatory deadlines and manage the increasing need to send decedents out of state for final disposition – Essential and mandated requirement, with no allocated funding

Short-Term Goals

- **Hire a staff forensic pathologist**
  - Keeps cases in-house
  - Reduces travel to other areas of the state
  - Minimizes vehicle wear and tear
  - Lowers safety risks for employees traveling
- **Achieve accreditation**
  - Currently, only **9 accredited offices in South Carolina**

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Lancaster County South Carolina

County Council Retreat
Proactive Policy Making for 2050

Public Safety Communications

Robert Purser

January 29, 2026

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Public Safety Communications

Lancaster County Public Safety Communications

Statistics – 2025 Calendar Year

Text to 911 – 301

Non Emergency Calls – 97,659

Emergency Calls – 51,825

Total Calls – 149,484

One call for service every 3.5 minutes of a 24 hour day.



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Public Safety Communications

Lancaster County South Carolina

Lancaster County Public Safety Communications manages and maintains a network of 8 Tower Sites and a fleet of 1,200+ radios both mobile and portable. Each radio is valued at roughly $7K, the total radio and accessory deployment is valued at roughly $8.4M. This accounts for LCSO, LPD, County Fire Service, City Fire, EMS, and Coroner.

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Public Safety Communications

Lancaster County South Carolina

- LCPSC does not receive funding from grants.
- LCPSC relies heavily on a reimbursement from the State and 911 Tariff Fees to fund our operations.
- 911 Tariff Fees are collected per wireless number and landline number in SC. This money is then allocated to counties depending on size and call volume.
- Current maximum reimbursement for Lancaster County from the State of South Carolina is $362,000. That is all we are able to recover annually via reimbursement.

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Public Safety Communications

Lancaster County South Carolina

LCPSC Equipment Status:

The phone system has been completely upgraded and is the latest technology currently available.

The uninterruptible power supply (UPS) has been rebuilt and will provide service for years to come.

The call center has been completely remodelled and the dispatch consoles (furniture) are less than 3 years old. We should get another 5-6 years of service out them.

The generators (2) will need to be replaced soon. They were put into service in 2013, and they are approaching end of life expectancy. **Approximate replacement cost is $150K per.**

The MCC7500E Dispatch Radio Consoles are approaching end of life. They were last replaced in July of 2021. The Motorola AXIS Dispatch Radio Console will be the new solution and the approximate replacement cost will be **$166K per console**. There are 12 consoles totalling **$1.9M**. This is a rough estimate and does not reflect state contract price discount.

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Public Safety Communications

Lancaster County South Carolina

Fire Dispatch CAD/Station Integration

- **Fire Dispatch CAD Integration by Motorola will save valuable time by automatically dispatching fire response to calls for service.**
- **Fire Dispatch Station Integration will save valuable time by automatically performing tasks at the stations, such as opening/closing bay doors for responding apparatus, bringing up the lights in the station, even turning off the stove when a station is alerted.**
- **All of these things take time when performed manually, and this automated, integrated system cuts down on response time by taking these tasks from the responder.**
- **This is a good time to look at this while we are planning for new Fire Stations in both the City and the County.**

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Public Safety Communications

Lancaster County South Carolina

Priority 1	Priority 2	Priority 3
Generator Replacement	Radio Console Replacement	Fire Dispatch Integration
Total Cost of $300K	Total Cost $1.9M	$750K
FY27	FY27 – FY28	FY27 - FY28

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Lancaster County
South Carolina

2026 County Council Retreat
Proactive Policy Making for 2050

Lancaster County Fire Rescue

Darren Player

January 29, 2026

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Lancaster County Fire Rescue

Lancaster County
South Carolina

Major Issues Concerning Lancaster County Fire Rescue

- Increase in Staffing (24 hour coverage for Greater Lancaster Area)
- Replacement of out of date apparatus
- Growth in Indian Land, North Corner and Edgewater areas
- Need for Stations, Training Facility, and Apparatus for new stations

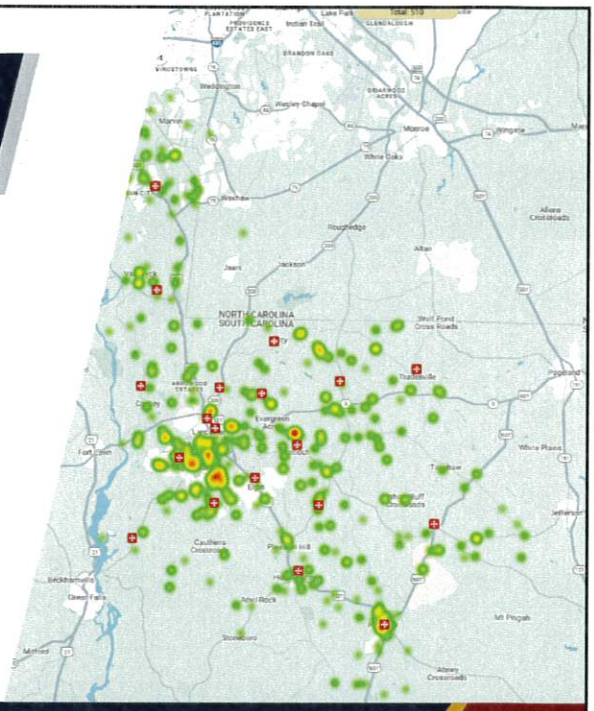
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Lancaster County Fire Rescue

McDonald Green Staffing Need Justification

Station	# of Dispatched Incidents From CAD	First Due Incidents	Incidents Without Record of Response
McDonald Green	621	411	210
Gooches	688	368	320
Bell Town	257	127	130
Elgin	462	382	80
Riverside	213	82	131
	2241	1370	871

Pictured right is a heat map of fires responded to by the county for 2025



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Lancaster County Fire Rescue

Lancaster County South Carolina

Standards and Guidelines Applying to Staffing, Stations, and Apparatus

NFPA 1710 Requires 16 Firefighters for a Single Family Residential Fire

ISO Requires a Fire Engine stationed within 5 road miles of all buildings for a Rating of less than 10

NFPA 1900 recommends apparatus more than 15 years old be placed in reserved status

NFPA 1900 states apparatus older than 25 years should be replaced

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Lancaster County
South Carolina

County Council Retreat
Proactive Policy Making for 2050

Indian Land Consolidated Fire Update

Greg Nicholson

January 29, 2026

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Indian Land Fire Update

Lancaster County
South Carolina

Top priorities for the Indian land Fire District for the 2026-2027 Budget

- **Fire Station 3:** The cost per square foot has decreased slightly from earlier estimates, with current contractor pricing ranging from $450–$550 per square foot. To improve cost efficiency, the proposed station footprint has been reduced to approximately 12,500 square feet. Using a midpoint estimate of $500 per square foot, the projected construction cost is approximately $6,25 million, plus soft cost at 20% $1.25 million = total cost $ 7.5 million with an estimated 18-month build time
- **Fire Engines:** Fire engine costs continue to increase, with current pricing at approximately $1.2 million per apparatus. While prices remain elevated, the market has stabilized and costs are holding steady. Lead times are improving, with standard builds estimated at approximately 47 months and BMP builds at approximately 28 months.
- **Rescue Personnel:** Staffing the rescue truck with full-time personnel will provide consistent and dependable coverage for one of the district's most complex and critical response units. This change ensures reliable staffing on an apparatus that responds to high-risk incidents such as vehicle extrications, technical rescues, and structure fires where it serves as the Rapid Intervention Crew (RIC). Full-time staffing improves continuity, training consistency, and operational readiness, while part-time personnel will continue to support backfill, supplemental staffing, and system-wide operational coverage.

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Lancaster County South Carolina

4. Discussion Items

i. Break

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Lancaster County South Carolina

4. Discussion Items

j. Enterprise Resource System (ERP) Update – *Sabrena Harris*

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Lancaster County
South Carolina

2026 County Council Retreat
Proactive Policy Making for 2050

Enterprise Resource System (ERP)

Sabrena Harris

January 29, 2026

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ERP Update

workday

Our Goals

Our Timeline

Our Budget

Our Staff Resources

Our Project Status & Successes

Our Future



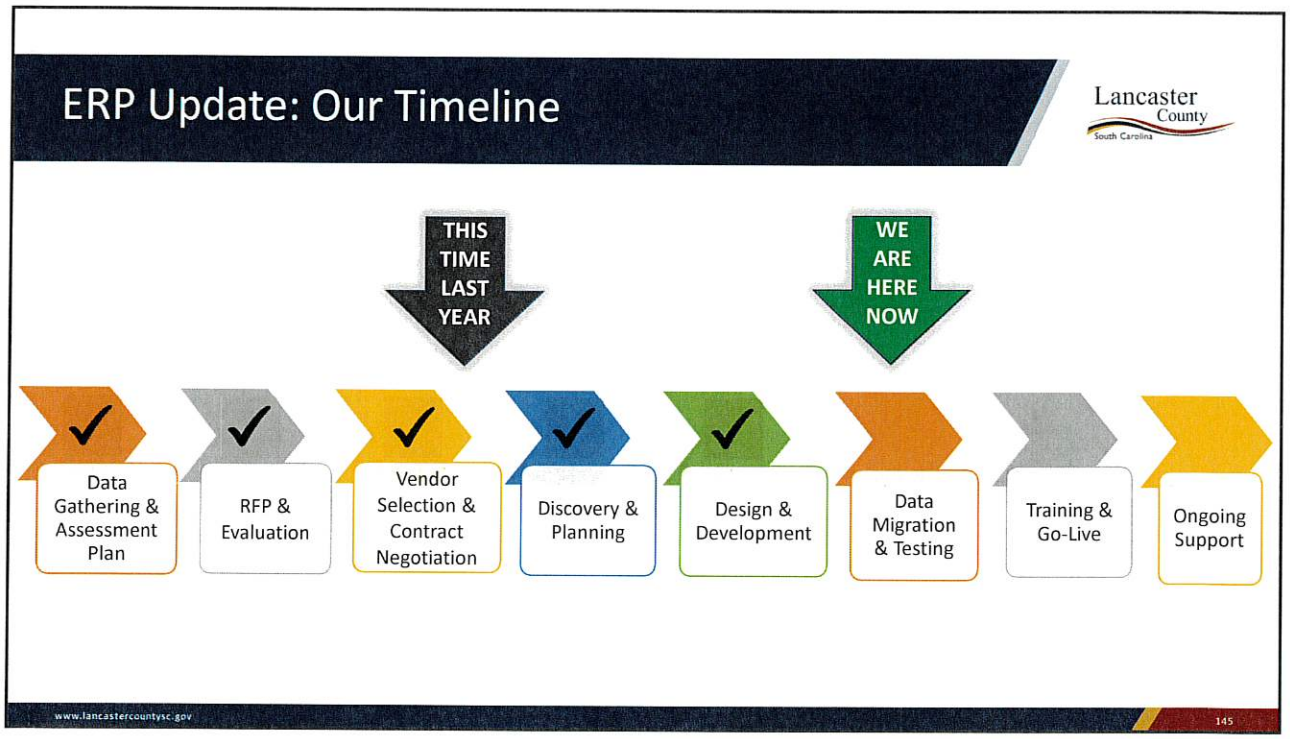
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ERP Update: Our Goals
Lancaster County South Carolina
workday.
Financial Management
Planning
Assets
Banking
Billing
Contracts
Revenue
Receivables
Payables
Projects
Inventory
Financials
Accounting Center
General Ledger
Expenses
Procurement
Analytics
Workday Way
www.lancastercountysc.gov
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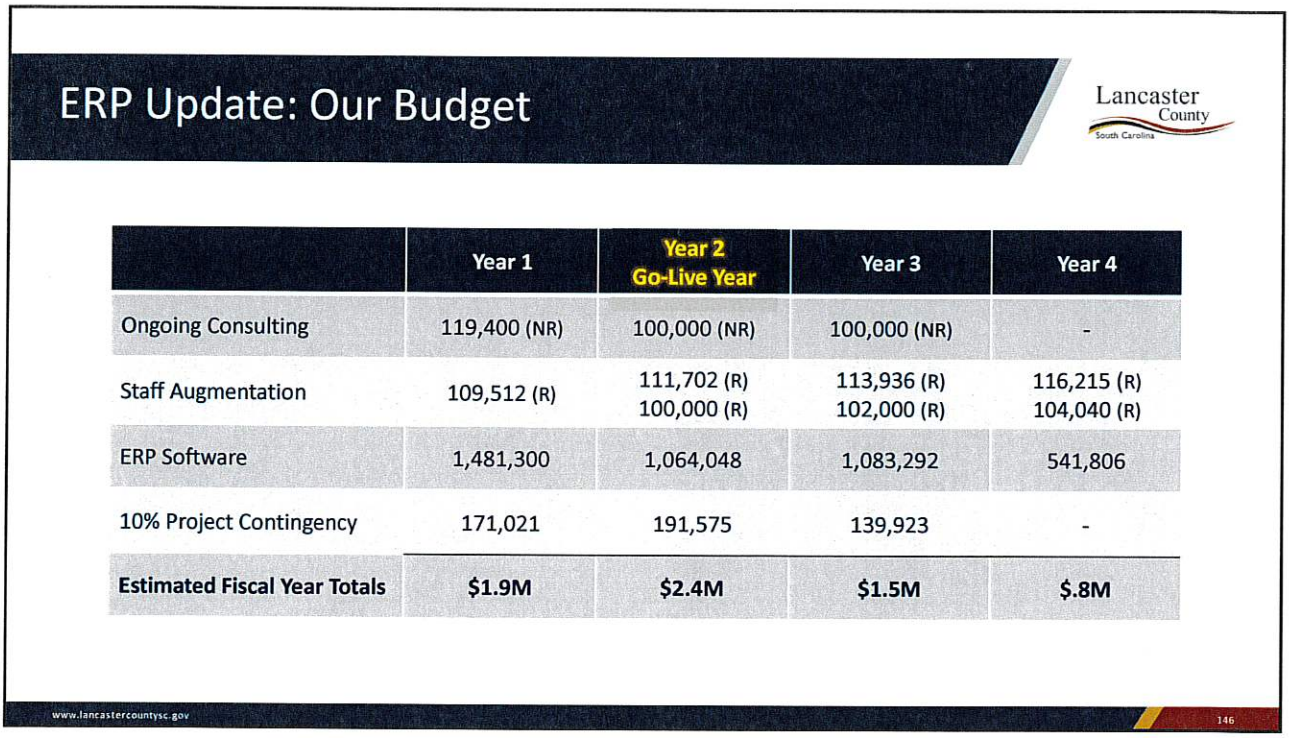
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ERP Update: Our Goals
Lancaster County South Carolina
workday.
Human Capital Management
Planning
Journeys
Compensation
Benefits
Talent
Learning
Employee Voice
People Analytics
Recruiting
Core HR
Onboarding
Absence
Help
Scheduling
Time Tracking
Payroll
Workday Way
www.lancastercountysc.gov
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	Year 1	Year 2 Go-Live Year	Year 3	Year 4
Ongoing Consulting	119,400 (NR)	100,000 (NR)	100,000 (NR)	-
Staff Augmentation	109,512 (R)	111,702 (R) 100,000 (R)	113,936 (R) 102,000 (R)	116,215 (R) 104,040 (R)
ERP Software	1,481,300	1,064,048	1,083,292	541,806
10% Project Contingency	171,021	191,575	139,923	-
Estimated Fiscal Year Totals	**$1.9M**	**$2.4M**	**$1.5M**	**$.8M**

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ERP Update: Our Staff Resources

17 STAFF

Lancaster County South Carolina

Workstream Assignments	
Security	Budgeting
Reporting	Customers Accounts & Accounts Receivable
Financials	Customer Contracts
Grants Management	Supplier Accounts & Accounts Payable
Banking & Settlements	Procurement
Business Assets (Fixed Assets)	Projects
Contracts	Human Capital

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ERP Update: Our Big Wins - Reasons to Celebrate

Lancaster County South Carolina

- ✓ Workday Training
- ✓ SmartFusion Exports
- ✓ FDM Workbooks
- ✓ Configuration Workbooks
- ✓ Accessing OUR Workday Tenant
- ✓ Training Staff to Test System
- ✓ Hitting Testing Targets

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ERP Update: Our Project Status

We are completing **Unit testing**

- Confirming system accuracy
- Testing real County transactions in the new system setup
- Validating internal controls - security, approvals, warnings, notifications
- This reduces risk before go-live.

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ERP Update: Our Project Status (as of January 22)

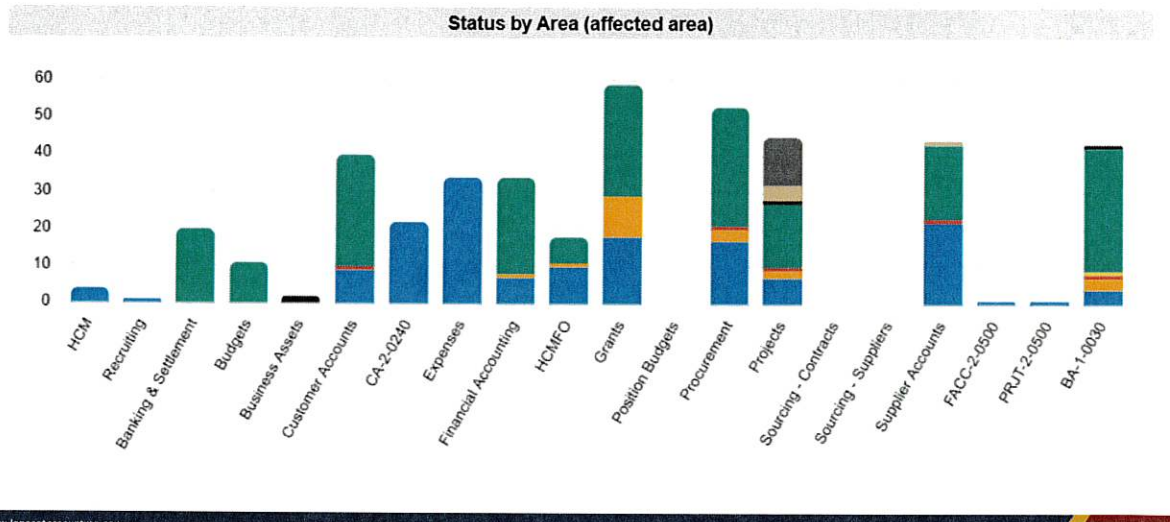
DEEP DIVE

All Scenarios	Not Started	In Progress	Failed	Retest	Passed	Deferred	On Hold	Canceled
432	157	21	5	1	226	5	13	4
53% Complete	36%	5%	1%	0%	52%	1%	3%	1%

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ERP Update: Our Project Status (as of January 22)

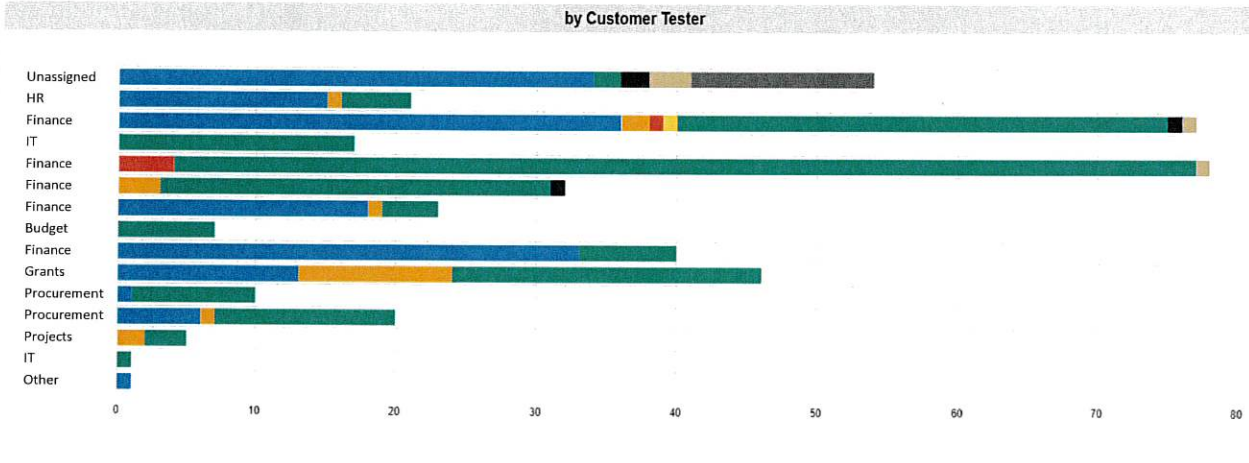
Lancaster County South Carolina



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ERP Update: Our Project Status (as of January 22)

Lancaster County South Carolina



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ERP Update: Our Future

Lancaster County South Carolina

What's next?

- Complete unit testing
- Followed by user acceptance testing
- End-user training
- Final data conversion
- GO LIVE!

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ERP Update: One Launch. One Team.

Lancaster County South Carolina

- July 1, 2026 remains the target go-live date
- Risks actively managed during each phase
- Staff is feeling the pressure BUT commitment is strong!!!
- Council partnership and support is essential!!!

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ERP Update : What Questions Do We Have?

Lancaster County South Carolina



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Lancaster County South Carolina

4. Discussion Items

k. Forecasting Budgetary Impacts for FY26 / FY27 – *Jamie Privuznak*

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Lancaster County
South Carolina

2026 County Council Retreat

Forecasting Budgetary Impacts for FY2027

January 29, 2026

Sabrena Harris, Chief Financial Officer
Jamie Privuznak, Budget Director

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Agenda

- Revenue Collections
- Preliminary Revenue Forecast
- Economic Influences
- Expenditure Drivers



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Forecasting Budgetary Impacts

Lancaster County South Carolina

General Fund - Major Revenue Source	Source Description
Ad-valorem – Real Property Tax	Taxes levied on the assessed value of real estate properties (e.g., commercial and residential property)
Vehicle – Personal Property Tax	Taxes assessed on personal vehicles, including cars, trucks, and motorcycles
Building Permits*	Fees collected for the approval of construction and renovation projects at the time the service is rendered and for the users of the service
Interest Income	Earnings from investments of county funds

*A moratorium on new residential development was approved by Council via Ord No. 2025-1992.

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Forecasting Budgetary Impacts

Lancaster County South Carolina

General Fund - Major Revenue Source	Source Description
Road Improvement Fees	$40 per vehicle charged to owners on personal property tax bill
Ambulance Charges	Revenue generated from emergency medical services provided to residents and visitors at the time the service is rendered and for the users of the service

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Preliminary Revenue Forecast

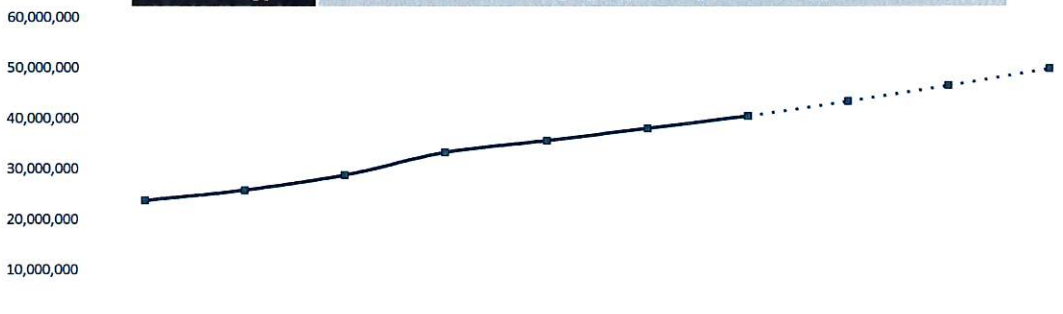


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Ad-valorem – Real Property Tax

Lancaster County South Carolina

Methodology Real estate market trends, property development, and appraisal values



	FY21 Actual	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Audited Actual	FY26 Adopted Budget	FY27 Estimate Budget	FY28 Forecast	FY29 Forecast	FY30 Forecast
AD VALOREM TAXES CURRENT	24,311,965	26,340,528	29,338,477	33,807,211	36,144,321	38,566,302	41,007,776	43,878,321	46,949,803	50,236,289

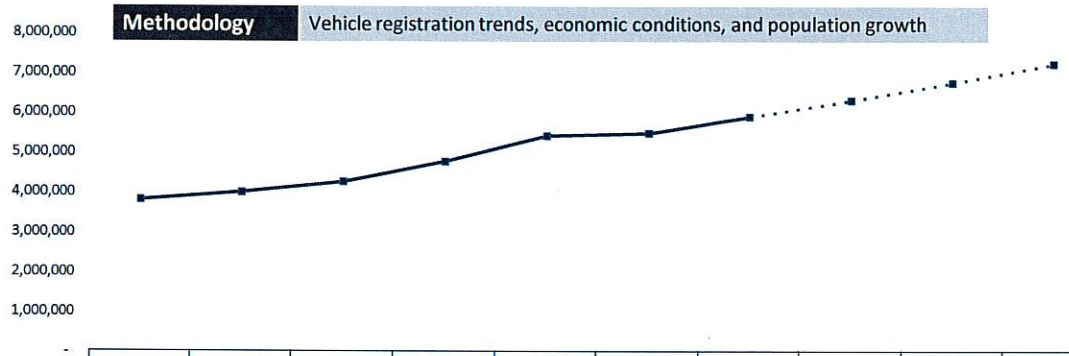
Note: Calendar year 2025 requires a reassessment of real property. FY26 actual is $24,582,994 as of December 31, 2025.

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Vehicle – Personal Property Tax

Lancaster County South Carolina

Methodology Vehicle registration trends, economic conditions, and population growth



	FY21 Actual	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Audited Actual	FY26 Adopted Budget	FY27 Estimate Budget	FY28 Forecast	FY29 Forecast	FY30 Forecast
VEHICLE TAXES - COUNTY	3,824,063	4,012,892	4,274,973	4,791,641	5,437,812	5,507,735	5,917,518	6,331,744	6,774,966	7,249,213

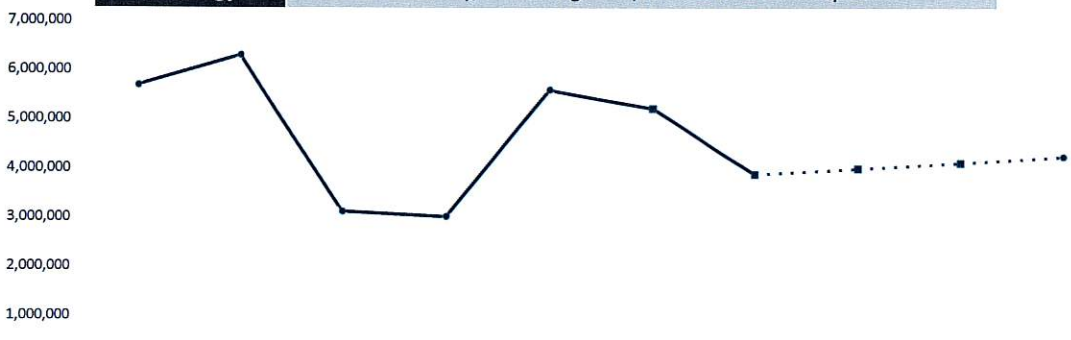
Note: FY26 actual is $2,912,461 as of December 31, 2025.

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Building Permits

Lancaster County South Carolina

Methodology Construction activity, economic growth, and real estate development



	FY21 Actual	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Audited Actual	FY26 Adopted Budget	FY27 Estimate Budget	FY28 Forecast	FY29 Forecast	FY30 Forecast
PERMITS - BUILDING	5,730,296	6,334,126	3,204,137	3,103,084	5,640,246	5,269,845	3,951,806	4,066,408	4,184,334	4,305,680

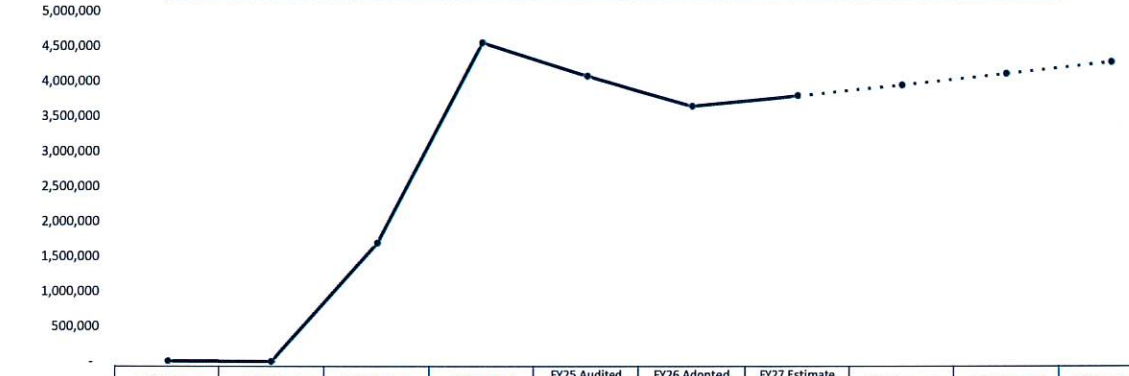
Note: County Council approved a moratorium on residential development in November 2025 (Ord No. 2025-1992). FY26 actual is $2,593,702 as of December 31, 2025.

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Interest Income

Lancaster County South Carolina

Methodology Interest rates, market performance, and investment strategies



	FY21 Actual	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Audited Actual	FY26 Adopted Budget	FY27 Estimate Budget	FY28 Forecast	FY29 Forecast	FY30 Forecast
INTEREST INCOME	83,401	73,546	1,743,110	4,566,924	4,094,881	3,668,633	3,815,378	3,967,993	4,126,713	4,291,782

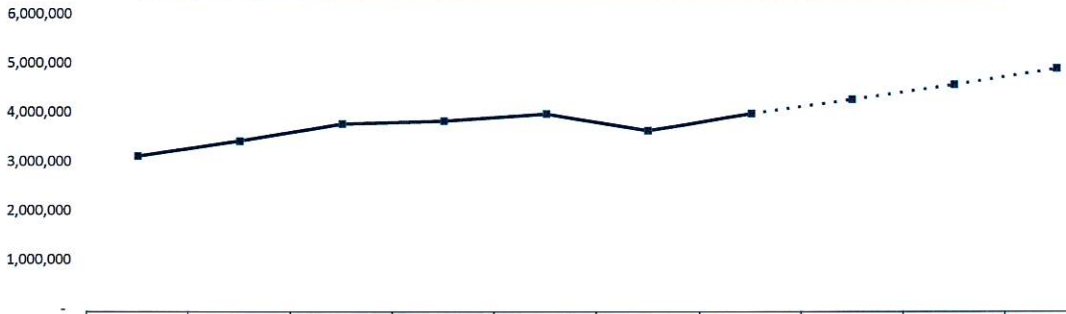
Note: FY26 actual is $1,440,859 as of December 31, 2025.

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Road Improvement Fees

Lancaster County South Carolina

Methodology Vehicle registration trends, economic conditions, and population growth



	FY21 Actual	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Audited Actual	FY26 Adopted Budget	FY27 Estimate Budget	FY28 Forecast	FY29 Forecast	FY30 Forecast
ROAD IMPROVEMENT FEES	3,154,315	3,460,173	3,807,819	3,866,524	4,007,454	3,672,000	4,018,140	4,299,410	4,600,369	4,922,394

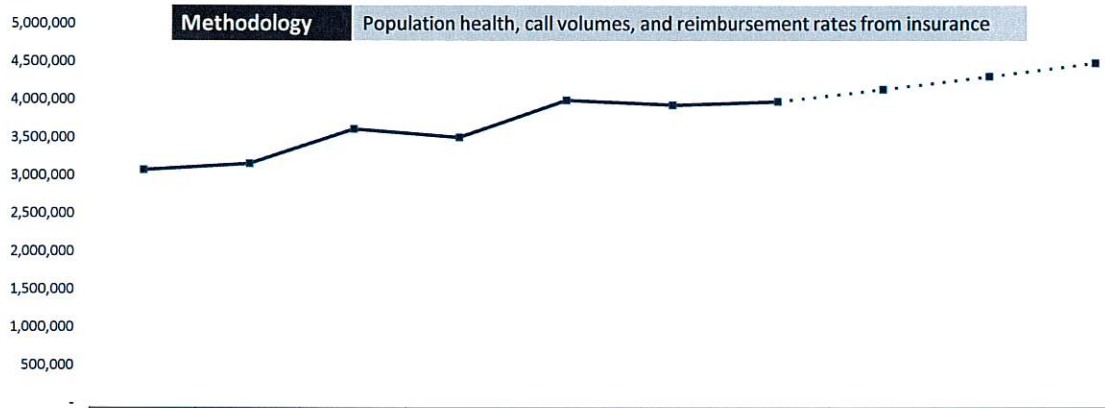
Note: FY26 actual is $1,978,945 as of December 31, 2025. Road Fee is $40 as noted in the Adopted Annual Fee Schedule.

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Ambulance Charges

Lancaster County South Carolina

Methodology Population health, call volumes, and reimbursement rates from insurance



	FY21 Actual	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Audited Actual	FY26 Adopted Budget	FY27 Estimate Budget	FY28 Forecast	FY29 Forecast	FY30 Forecast
Ambulance Charges	3,108,044	3,192,337	3,643,988	3,536,089	4,020,286	3,959,619	4,003,286	4,163,417	4,329,954	4,503,152

Note: FY26 actual is $1,848,432 as of December 31, 2025.

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Unassigned Fund Balance – General Fund

Lancaster County South Carolina

Unassigned Fund Balance – Audited Start Period Ending June 30, 2025	$72,005,083
FY26 Adopted Budget – Fund Balance Appropriations (Ord. No. 2025-1971)	(5,065,474)
Solicitor – Office Expansion Project in County Courthouse (Ord. No. 2025-1993)	(600,000)
Lancaster EMS – 11 cardiac replacement monitor purchase (Ord. No. 2025-1993)	(489,332)
Estimated Net Change in Unassigned Fund Balance:	**$65,850,277**
Pending budget ordinance amendments as of December 31, 2025:	
Lancaster EMS – Garage Bay Project (Ord. No. 2025-2010)	(180,000)

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Other Funds: Budget v. Actuals Revenue

Lancaster County South Carolina

Fund Name	FY2026 Budget	YTD Collections ($) (through Dec 31)	YTD Collections (%) (through Dec 31)	Variance ($)
County Impact Fees	365,380	785,693	215%	(420,313)
Capital Replacement	5,028,900	2,363,770	47%	2,665,130
Court Mandated Security	2,344,495	1,790,146	76%	554,349
E-911	749,222	295,659	39%	453,563
Hospitality Tax	2,564,074	898,576	35%	1,665,498
State Accommodations Tax	225,000	7,186	3%	217,814

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Other Funds: Budget v. Actuals Revenue

Lancaster County South Carolina

Fund Name	FY2026 Budget	YTD Collections ($) (through Dec 31)	YTD Collections (%) (through Dec 31)	Variance ($)
Stormwater	2,877,821	1,277,566	44%	1,600,255
County Transportation Committee – State C Funds	6,336,660	546,718	9%	5,789,942
State Aid to Library	264,689	264,689	100%	-
Local Accommodations Tax	160,000	68,355	43%	91,645
Debt Service	4,760,286	3,260,950	69%	1,499,336
Airport	566,408	197,682	35%	368,726

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Other Funds: Budget v. Actuals Revenue

Lancaster County South Carolina

Fund Name	FY2026 Budget	YTD Collections ($) (through Dec 31)	YTD Collections (%) (through Dec 31)	Variance ($)
Van Wyck Fire Service District	163,751	222,080	136%	(58,329)
Indian Land Consolidated Fire Service District	7,970,665	5,162,208	65%	2,808,457
Capital Project Sales Tax 3 (1% Local Option Sales Tax)	17,116,532	4,649,012	27%	12,467,520
DSS Special Revenue Fund*	-	-	-	-

*Council approval of this fund was in process, during the creation of this presentation. For FY27, this fund will be presented as such during the upcoming budget process.

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South Carolina Economic Snapshot

Lancaster County South Carolina

- State economy is growing at a healthy but more normal pace
- Economic growth supports sales tax collections
- Inflation is easing, but labor, construction, and related services remain costly
- State revenue outlook points to cautious but steady growth
- Labor market remains relatively stable, supporting household income and consumer spending;

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Lancaster County Economic Snapshot

Lancaster County South Carolina

Strong local economy driven by population growth

Population growth remains a long-term driver of both revenue capacity and service demand.

Housing and development activity is leveling out after several years of elevated growth

Low unemployment supports stable tax collections

Employment conditions remain stable, supporting sales and usage-based revenues.

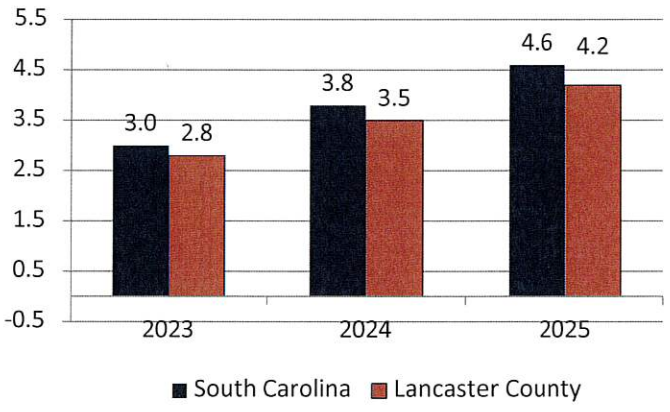
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Lancaster County Economic Snapshot

Lancaster County South Carolina

- County often outperforms the State on unemployment



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Other Budgetary Influences

Budgetary Factor	Notes
2026 IRS Standard Mileage Rate	**72.5 cents** per mile effective January 1, 2026; up 2.5 cents from prior year
Federal Grant Awards to County	Termination and expiration of certain federal grant awards

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Cost Drivers to Consider

- For Personnel budget:
  - Grants funding expiring for certain positions and SAMHSA grant termination
  - 22 positions in FY26 only funded for half year
  - New position requests and career ladder adjustments
  - Employer contributions to State retirement and State insurance plan
  - Across-the-board merit increase amounts
  - Market study and pay compaction within and across job classifications
  - Workers Compensation rate increases
  - Overtime needs

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Cost Drivers to Consider

Lancaster County South Carolina

- For Annual Operating budget:
  - Construction and material costs
  - Professional service increases
  - Insurance premium increases: property, liability, cyber, fleet
  - Utility cost escalations: electricity, natural gas, water, fuel, etc.
  - Multi-year, long-term contractual commitments: ERP and other licensing, hosting, and support fees
  - Added cleaning, maintenance, IT, utility (rate increases from Duke), and vehicle costs after implementation of a capital project or purchase of a capital asset
  - Regulatory and compliance costs

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Next Steps

Lancaster County South Carolina

- Council's role: Set strategic direction for the FY27 budget year
- Staff's role:
  - Monitor collections, expenditures, and economic trends
  - Collaborate to refine and adjust revenue forecasts accordingly
  - Implement strategic direction via the annual budget process

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Questions

Lancaster County South Carolina



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Lancaster County South Carolina

4. Discussion Items

I. **Council Direction: Strategic Priorities for FY26 / FY27 – *Sabrena Harris***

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Lancaster County
South Carolina

5. Adjournment

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