Union County, NC

Union County Government Center
500 North Main Street
Monroe, North Carolina

Meeting Agenda

Monday, June 1, 2026
6:00 PM

Board Room, First Floor

Board of Commissioners

Chair Brian Helms
Vice Chair Christina Helms
Commissioner Clancy Baucom
Commissioner Melissa Merrell
Commissioner Errol Wedra

Closed Session - 5:15 PM

26-327 **Closed Session**

INFORMATION CONTACT:
Lynn G. West, Clerk to the Board of Commissioners, 704-283-3853
ACTION REQUESTED:
Enter into Closed Session pursuant to NCGS 143-318.11.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
Enter into Closed Session for the following purpose(s):
1) pursuant to G.S. 143-318.11(a)(1), to prevent the disclosure of information that is privileged or confidential pursuant to G.S. 132-1.1(a); and
2) pursuant to G.S. 143-318.11(a)(3), to consult with an attorney in order to preserve the attorney-client privilege; and
3) pursuant to G.S. 143-318.11(a)(4), to discuss matter relating to the location or expansion of industries or other businesses in the area served by the public body, including agreement on a tentative list of economic development incentives that may be offered by the public body in negotiations.
FINANCIAL IMPACT:
None.

Opening of Meeting - 6:00 PM

Invocation - Vice Chair Christina Helms

Pledge of Allegiance

Informal Comments

Public Hearing(s)

26-317 **Public Hearing - County Manager's Proposed Fiscal Year 2027 Budget**

INFORMATION CONTACT:
Jason May, Budget & Grants Management, Director, 704-283-3760
ACTION REQUESTED:
Hold a Public Hearing.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
In accordance with North Carolina General Statutes, Union County is required to present and hold a public hearing on the proposed budget for

the upcoming fiscal year. The County Manager will present the recommended Fiscal Year 2026-2027 Operating and Capital Budget that outlines the County's financial plan for delivering essential services, funding infrastructure needs, and supporting community priorities.

The budget reflects a commitment to responsible fiscal management, strategic investment, and maintaining high-quality service delivery across all departments. The public hearing provides an opportunity for residents, stakeholders, and elected officials to review and provide feedback on the proposed plan prior to its adoption.

FINANCIAL IMPACT:

None.

Staff Recognition

26-244 **GFOA Distinguished Budget Award**

INFORMATION CONTACT:

Jason May, Budget and Grants Management, Director, 704-283-3760

ACTION REQUESTED:

Recognize the Union County Budget Management team for receiving the Government Finance Officers Association's (GFOA) Distinguished Budget Presentation Award.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Government Finance Officers Association of the United States and Canada has announced that Union County has received the GFOA's Distinguished Budget Presentation Award for its FY2026 budget.

In order to receive this award, Union County had to satisfy nationally recognized guidelines for effective budget presentation. These guidelines are designed to assess how well an entity's budget serves as a policy document, financial plan, operations guide, and communications device. Budget documents must be rated "proficient" in all four categories, and the fourteen mandatory criteria within those categories, to receive the award. This is the thirteenth consecutive year the Union County Budget Management department has received this award.

FINANCIAL IMPACT:

None.

26-274 **Recognize 2026 Bobby Cobb Award Recipient**

INFORMATION CONTACT:

Patrick Niland, County Manager's Office, Deputy County Manager, 704-283-3630

ACTION REQUESTED:

Recognize Program Manager for the Behavioral Health Collaborative, Christina Neal, as this year's Bobby Cobb Award Recipient.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County's Program Manager for the Behavioral Health Collaborative, Christina Neal, has received the 2026 Bobby Cobb Award, presented annually to employees who make a meaningful impact across departments or community groups. Neal's leadership in launching cross-departmental mental health initiatives and establishing partnerships with local organizations exemplifies the spirit of the award through her dedication to improving services for Union County residents.

Over the past eight years, Neal has played a pivotal role in building the county's Behavioral Health Collaborative, transforming it from an initial concept into a comprehensive program that supports students and families. The Collaborative, developed in partnership with Union County Public Schools (UCPS), expands access to behavioral health resources and creates a coordinated system of care for young people.

Neal's influence extends beyond program development. As a dedicated leader, she has organized ongoing professional development for her team of social workers and behavioral health professionals, improved crisis response protocols, and ensured staff are equipped with tools and resources for success, frequently stepping in to support her team during challenging situations.

The Bobby Cobb Award was established in 2022 in memory of Bobby Cobb, a dedicated Public Health employee who served Union County for many years. Cobb was crucial in supporting the County through the COVID-19 pandemic, acting as the primary point of contact for all county employees. He provided essential guidance, resources and information to every department. His unwavering commitment to public service had a lasting impact on Union County. This award continues to honor his legacy by recognizing employees who demonstrate exceptional dedication and service.

FINANCIAL IMPACT:

None.

Consent Agenda

26-301 **FY2027 Catawba River Water Treatment Plant Budget**

INFORMATION CONTACT:

Hyong Yi, Union County Water, Administrator, 704-296-4212

ACTION REQUESTED:

Approve annual Catawba River Water Treatment Plant (CRWTP) Budget for FY2027.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Section 3.10 of the Catawba River Water Supply Project (CRWSP) Joint Venture Agreement requires the annual budget to be approved by the Union County Board of County Commissioners. The annual budget is developed based on projected water demand from Lancaster Water and Sewer District and Union County Water and the cost for chemicals, equipment, and labor. These costs are then apportioned to the Lancaster Water and Sewer District or Union County based on our water demand. The budget is approved by the governing board for the CRWSP before it is sent to the two owners for their approval per Section 3.10 of the joint venture agreement.

For FY2027, the budget is projected to increase by $629,625 from $8.04 million to $8.67 million. Significant increases include: the cost of chemicals ($125,000), maintenance ($245,000), and labor expense ($244,500). A copy of the FY2027 budget breakdown for the CRWSP is attached.

FINANCIAL IMPACT:

Union County Water budgets each year to purchase water from the CRWSP based on the budget proposed by CRWSP.

26-294 **Contract - Biosolids Master Plan**

INFORMATION CONTACT:

John Shutak, Union County Water, Engineering Director, 704-283-3651

ACTION REQUESTED:

Authorize the County Manager to 1) negotiate and execute an agreement with Black & Veatch International Company substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Capital Improvement Program for Union County Water (UCW) includes an annual allocation for Water Reclamation Facility (WRF) rehabilitation. The Biosolids Master Plan is necessary to develop a long-term, sustainable strategy for managing the biosolids generated at UCW’s five WRFs.

Black & Veatch International Company has been selected to provide engineering services for Task Order 10021-01: Biosolids Master Plan. Black & Veatch International Company was chosen from a list of vendors previously selected from RFQ 2026-002 - Engineering Services for Water Reclamation Facility Improvements to provide these services for Union County Projects.

FINANCIAL IMPACT:

The total cost of Task Order 10021-01 with Black & Veatch International

Company is $1,229,500.00. Sufficient funds are available within the adopted capital account 60185101 - WRF Biosolids Master Plan.

26-300 **Contract - Task Order Amendment to 12-Mile Site 5 Sub-Metering Task Order**

INFORMATION CONTACT:
Christopher Clark, Union County Water, Director of Water and Wastewater Operations, 704-296-4215
ACTION REQUESTED:
Authorize the County Manager to 1) negotiate and execute an agreement with Gavel and Dorn Engineering, PLLC, substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
Pursuant to past flow metering having been performed in the 12-Mile Creek drainage basin under a previous contract, this task order will further refine our evaluation of “Site 5” as it exhibited significant amounts of rainfall induced inflow and infiltration. Under the original Task Order, Gavel and Dorn Engineering, PLLC, installed seventeen (17) flow meters and two (2) rain gauges within the Site 5 basin along with two (2) flow meters and one (1) rain gauge in the Poplin Pump Station basin. Due to a lack of rain events resulting in an extended duration of flow monitoring, additional funding is needed to complete our study of this basin.
FINANCIAL IMPACT:
The cost for this amended task order is $188,750. Funding is available in the adopted FY2026 budget appropriation in budget code 60026510-5381.

26-304 **Resolution for Dedication of a General Public Utility Easement for the City of Monroe on Union County Property**

INFORMATION CONTACT:
John Shutak, Union County Water, Engineering Director, 704-283-3651
ACTION REQUESTED:
Adopt resolution dedicating a general public utility easement on the property of Union County for the benefit of the City of Monroe.
PRIOR BOARD ACTIONS:
1) November 18, 2019, Regular Meeting, Agenda Item #5 - Approved WK Dickson & Co., Inc. Task Order 2017-09 for engineering design services.
2) May 05, 2021, Regular Meeting, Agenda Item #10 - Approved WK Dickson & Co., Inc. Task Order 2017-09 Amendment 01 for engineering design services.
3) August 01, 2022, Regular Meeting, Agenda Item #22-491 - Approved

WK Dickson & Co., Inc. Task Order 2017-09 Amendment 03 for engineering design services.
4) October 16, 2023, Regular Meeting, Agenda Item #23-707 - Approved RH Price, Inc. bid award, approved WK Dickson & Co., Inc. Task Order 2021-11 for construction services, and approved Capital Project Ordinance No. 360 for construction funding.

BACKGROUND:

The City of Monroe requests that Union County adopt a resolution for dedication of a general public utility easement for the maintenance of the newly installed Piedmont Innovation Park gravity sewer.

FINANCIAL IMPACT:

None.

26-262 **Amendments to Chapter 20 of the Union County Code**

INFORMATION CONTACT:

Jon Williams, Fire Marshal's Office, Fire Marshal, 704-296-4296

ACTION REQUESTED:

Adopt ordinance to amend Chapter 20 of the Union County Code.

PRIOR BOARD ACTIONS:

Board of County Commissioners passed and approved a fire code ordinance on February 1st, 1993.

BACKGROUND:

Our current ordinance was enacted in February of 1993. The revised ordinance reflects updated civil penalties and revisions to the issuance of permits for pyrotechnics. The revised ordinance also requests that the North Carolina Building Code Council grant our request that a mandatory permit be issued for mobile food preparation vehicles, more stringent requirements for combustible landscaping materials and gates and adoption of Appendices B, C, and D. These appendices are as follows: Fire-flow Requirements for Buildings, Fire Hydrant Locations & Distribution, and Fire Apparatus Access Roads.

FINANCIAL IMPACT:

None.

26-328 **Grant Application - Meals on Wheels America Meeting Unmet Need Acceleration Gift Distribution**

INFORMATION CONTACT:

Stephanie Starr, Human Services Agency - Department of Community Support and Outreach, Director, 704-296-4302

ACTION REQUESTED:

Authorize the County Manager to submit the associated grant application and make necessary assurances and certifications associated with the grant application as substantially consistent with this agenda item, which includes the authorization to execute documents related to the award of the grant and budget funds as appropriate.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

In April 2026, Meals on Wheels America (MoWA) announced that philanthropist MacKenzie Scott made a $70 million unrestricted gift to support its national network. MoWA is using this investment to strengthen and expand local providers' capacity to meet the growing demand for senior nutrition services nationwide.

As part of this effort, Meals on Wheels America established the Meeting Unmet Need Acceleration Investment, a $10 million initiative designed to support providers experiencing high demand. Acceleration Gift Distributions provide $10,000 to member organizations with active waitlists for meals.

These distributions are non-competitive and require only the completion of a brief acknowledgment form to accept funding. Recipients are not subject to additional reporting requirements, and no local match is required.

Union County was contacted about the availability of these funds on 5/20/26 and will be required to sign documentation by 6/10/26 to receive the $10,000. The funds will be utilized to purchase meals.

FINANCIAL IMPACT:

$10,000 will be awarded with no required match.

26-285 **Appointment of Deputy Finance Officer**

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

Appoint Aries Tanggani, Accountant, to serve as a “Deputy Finance Officer” in order to pre-audit obligations.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

G.S. 159-8 directs that no county "may expend any moneys…except in accordance with a budget ordinance or project ordinance."

The pre-auditing of obligations, required by G.S. 159-28(a), is a principal legal mechanism for assuring compliance with the budget ordinance and each project ordinance. The pre-audit rule provides that no obligation may be incurred in an activity accounted for in a fund project ordinance unless two requirements are met. First, the obligation must be authorized; that is, one of the ordinances must contain an appropriation to cover it. Second, the authorization must not be exhausted; sufficient unspent and unencumbered funds must remain in the appropriation to meet the obligation when it comes due. Only if both requirements are met is the obligation validly incurred.

Completion of this two-stage review is evidenced by placing the finance officer's certificate on the obligations. Having the deputy finance officer authorized to pre-audit obligations is important and such delegation will occur only with the approval of the County's finance officer and only when adequate internal controls are built into the payment procedures that are used.

FINANCIAL IMPACT:

None.

26-322 **NC Department of Public Safety - Juvenile Crime Prevention Council Funding FY 2026**

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

1) Approve revised County Funding Allocation Plan FY 2025-2026, 2) authorize the Finance Director to approve the funding plan, grant agreements and documents related to such grant agreements during their terms, and 3) adopt Budget Amendment #24.

PRIOR BOARD ACTIONS:

1) June 16, 2025, Regular Meeting, Agenda Item 25-383 - Approved County Funding Plan for FY 2025-2026, Authorized the Finance Director to approve the grant agreements and documents related to such grant agreements during their term, and authorized the County Manager to appropriate JCPC Funding as approved in the funding plan by a County Manager’s Budget Amendment in FY 2026.

2) May 4, 2026, Regular Meeting, Agenda Item 26-244 - Approved Discretionary Award for FY 2025-2026, authorized the Finance Director to approve an updated funding plan, grant agreements and documents related to these additional funds during their terms, and approved Budget Amendment #22.

BACKGROUND:

The Juvenile Crime Prevention Council (JCPC) is a Board appointed by Commissioners, as defined by State Statutes. The JCPC provides funding and monitors Community Based alternatives to juvenile incarceration and provides funding for substance abuse prevention strategies and programs.

Funding for JCPC programs is generally adopted in the State Budget and assigned to County programs by a formula grant. Normally, a county JCPC approves a budget for the upcoming fiscal year, which is then submitted to the North Carolina Department of Public Safety Juvenile Justice and Delinquency Prevention (the DJJ). The attached revised funding plan was developed and approved by the JCPC Board and represents the Board's plan for how the funds will be spent for the 2025-2026 fiscal year.

The JCPC budget is normally approved as a "pass-through" line-item in the County budget, meaning that the amount approved by the State is received by the County and then used for the JCPC program.

Union County has not approved JCPC programs in line-item detail in the past; rather, the JCPC Board normally negotiates, approves, and monitors line-item detail within the amount of funds allocated to the program, and provides a recommended budget to Commissioners.

FINANCIAL IMPACT:

None.

26-303 **Compensation Adjustment for the Clerk to the Board**

INFORMATION CONTACT:

Julie Broome, Human Resources, Director, 704-283-3869

ACTION REQUESTED:

Authorize the BOCC Chairman to take administrative action as necessary to provide an annual increase in compensation of $9,605.12 to the Clerk to the Board, effective January 1, 2026.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Pursuant to G.S. 153A-92(a), the Board of County Commissioners is charged with the responsibility of determining the compensation of all county officers and employees, including the appointed position of the Clerk to the Board.

FINANCIAL IMPACT:

No additional funding required. Sufficient funding is available in the FY2026 budget.

26-305 **Compensation Adjustment for the County Manager**

INFORMATION CONTACT:

Julie Broome, Human Resources, Human Resources Director, 704-283-3869

ACTION REQUESTED:

Authorize the BOCC Chairman to take administrative action necessary to provide an annual increase in compensation of $7,046.88 to the County Manager effective January 1, 2026.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Pursuant to G.S. 153A-92(a), the Board of County Commissioners is charged with the responsibility of determining the compensation of all county officers and employees, including the appointed position of the County Manager.

FINANCIAL IMPACT:

No additional funding required. Sufficient funding is included in the FY2026 budget.

26-306 Compensation Adjustment for the County Attorney

INFORMATION CONTACT:
Julie Broome, Human Resources, Human Resources Director, 704-283-3869
ACTION REQUESTED:
Authorize the BOCC Chairman to take administrative action necessary to provide an annual increase in compensation of $7,046.88 to the County Attorney, effective January 1, 2026.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
Pursuant to G.S. 153A-92(a), the Board of County Commissioners is charged with the responsibility of determining the compensation of all county officers and employees, including the appointed position of the County Attorney.
FINANCIAL IMPACT:
No additional funding required. Sufficient funding is included in the FY2026 budget.

26-310 Union County CDBG 2026-2030 Consolidated Plan and 2026 Annual Action Plan

INFORMATION CONTACT:
Monica Culbreath, County Manager's Office, Grant Specialist, 704-283-3580
ACTION REQUESTED:
1) Adopt the Union County 2026-2030 Consolidated Plan and the 2026 Annual Action Plan; 2) authorize the County Manager to execute the required submittal documents to the U.S. Department of Housing and Urban Development (HUD); and 3) authorize the County Manager to negotiate and execute agreements with Community Development Block Grant (CDBG) subrecipients substantially consistent with this agenda item.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
Union County became a HUD Entitlement Community in 2016 and began receiving annual Community Development Block Grant (CDBG) funding on July 1, 2016. The purpose of the CDBG program is to develop viable communities by providing decent housing, a suitable living environment, and expanded economic opportunities principally for low- and moderate-income persons. Eligible activities include housing rehabilitation, public services, public facilities and infrastructure

improvements, economic development, planning, and administration.

As required by HUD, entitlement communities must prepare and submit a five-year Consolidated Plan that identifies community needs, establishes priorities, and outlines a strategic plan for the use of federal housing and community development funds. The 2026-2030 Consolidated Plan serves as Union County's strategic planning document for the upcoming five-year period.

Additionally, HUD requires the submission of an Annual Action Plan each program year to identify the specific projects and funding allocations proposed for that year. The 2026 Annual Action Plan represents the first program year of the 2026-2030 Consolidated Plan and covers the period beginning July 1, 2026, and ending June 30, 2027.

The County conducted the required citizen participation process, including public notices and public hearings, to obtain community input regarding housing, community development, and public service needs prior to preparation of the plans.

FINANCIAL IMPACT:

The requested amount for the 2026 Annual Action Plan is $843,937.00. This amount represents the total allocation Union County is eligible to receive from HUD for the FY2026-2027 program year.

26-308 **Minutes for Approval**

INFORMATION CONTACT:
Lynn G. West, Clerk to the Board of Commissioners, 704-283-3853
ACTION REQUESTED:
Approve minutes
PRIOR BOARD ACTIONS:
None
BACKGROUND:
Draft minutes have been sent to the Commissioners for review.
FINANCIAL IMPACT:
None

Information Only

26-293 **Human Resources Reports for April 2026**

INFORMATION CONTACT:
Julie Broome, Human Resources, Director, 704-283-3869
ACTION REQUESTED:
None - Information Only.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:

These reports include all new hires, separations from service, and retirements for Union County Local Government for the month of April 2026.

FINANCIAL IMPACT:

None.

26-297 **Tax Refunds, Releases and Prorations Approved by Finance Officer**

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than $100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for April 2026 NCVTS releases and refunds less than $100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.

26-307 **2025 Communications Year End Report**

INFORMATION CONTACT:

Liz Cooper, Public Communications, Director, 704-283-3587

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This report provides valuable metrics and insights into communication platforms and our efforts to collaborate with all County departments to inform and engage residents, promote programs and services, and strengthen internal and external communications. This report includes information for the calendar year 2025.

FINANCIAL IMPACT:

None.

26-318 **April 2026 Union County Public Schools Monthly Report**

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This is the monthly report from UCPS as required by the Budget Ordinance.

FINANCIAL IMPACT:

None.

Business

26-314 **Rezoning Petition CZ-2026-001 Marcham**

INFORMATION CONTACT:

Bjorn Hansen, Planning Department, Senior Planner - Current Planning, 704-283-3690

ACTION REQUESTED:

Approve or deny rezoning petition

To ***approve*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) adopt the ordinance approving revision to the official zoning map of Union County, North Carolina, and (ii) adopt the consistency and reasonableness statement for approval.

To ***deny*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) deny rezoning petition CZ-2026-001 submitted by Tom Marcham; and (ii) adopt the consistency and reasonableness statement for denial.

PRIOR BOARD ACTION:

None.

BACKGROUND:

This case is requesting to rezone one parcel totaling 5 acres appearing on the tax map as tax parcel 09-414-019A along NC 75 from RA-40 to Light Industrial (LI) CZ with Amended Conditions in order to develop a landscaping supply business and limited construction equipment storage. The rezoning will include the following conditions:

1) Limited to approved site plan dated April 7, 2026
2) Uses limited to landscaping supply business and construction equipment storage
3) Five-year vesting of development rights
4) Development will meet all requirements of the Union County Unified

Development Ordinance on the date of approval

5) Access may be restricted to right in right out in the future, at the discretion of the NCDOT, based on safety issues that may be created by this site

A community meeting was required and was held on March 30, 2026. A total of six residents attended the meeting and asked questions about fencing, lighting, traffic and stormwater impacts. No changes were made to the site plan as a result of the meeting.

The Land Use Board evaluated this proposal at its April 21, 2026 meeting and recommended approval on a 5-0 vote, citing consistency with the land use map.

A public hearing was conducted on May 18, 2026, and no one spoke for or against the rezoning.

FINANCIAL IMPACT:

None.

26-315 **Rezoning Petition CZ-2026-006 House of Pearls**

INFORMATION CONTACT:

Bjorn E. Hansen, Planning Department, Senior Planner - Current Planning, 704-283-3690

ACTION REQUESTED:

Approve or deny rezoning petition.

To ***approve*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) Adopt the Ordinance Approving Revision to the Official Zoning Map of Union County, North Carolina and the associated Master Planned Development Plan, and (ii) adopt the consistency and reasonableness statement for approval.

To ***deny*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) Deny rezoning petition CZ-2026-006 submitted by Steve Merritt and the associated Master Planned Development Plan; and (ii) adopt the consistency and reasonableness statement for denial.

PRIOR BOARD ACTION:

None.

BACKGROUND:

This case is a request to rezone an approximately 10.92 acre portion of

one parcel totaling 12.21 acres appearing on the tax map as tax parcel 02-226-017 located on Camden Road from RA-40 to a Master Planned Development District. The request is to develop a long-term residential drug rehabilitation facility for up to 80 residents and staff. The rezoning request is a conditional rezoning and includes the following conditions:

- The use shall be limited to a residential recovery and life-skills program.
- The maximum duration of residency for program participants shall be twenty-four (24) months. The minimum duration of residency for program participants shall be ninety (90) days.
- The use shall not include medical detoxification or inpatient clinical treatment services.
- The use shall not be converted to a shelter, boarding house, correctional facility, halfway house for parolees, or a use not specifically allowed by these conditions.
- Overnight occupancy shall be limited to enrolled program participants and on-site staff only.
- The maximum number of residents shall not exceed 80.
- The development may occur in phases.
- All outdoor lighting shall utilize full cutoff fixtures and shall be directed away from adjacent properties.
- Organized outdoor activities shall not occur on site between 9 PM and 7 AM.
- A local contact person shall be provided to adjacent property owners and the County and updated annually.
- No onsite parking for resident vehicles.

The Land Use Board evaluated this rezoning request at its April 21, 2026, meeting. The Board recommended approval on a 5-0 vote, citing consistency with the land use map.

A public hearing was conducted on May 18, 2026. Over one dozen people spoke in favor of the rezoning, citing the effectiveness of the program and the minimal impacts to the surrounding area. One person spoke against, citing inappropriate uses near residential and rural areas, as well as a dangerous intersection immediately west of the site.

FINANCIAL IMPACT:

None.

County Manager's Comments

Commissioners' Comments

Adjournment

Union County Government Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-327 **Agenda Date:** 6/1/2026

TITLE:

Closed Session

INFORMATION CONTACT:

Lynn G. West, Clerk to the Board of Commissioners, 704-283-3853

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Enter into Closed Session for the following purpose(s):

1) pursuant to G.S. 143-318.11(a)(1), to prevent the disclosure of information that is privileged or confidential pursuant to G.S. 132-1.1(a); and
2) pursuant to G.S. 143-318.11(a)(3), to consult with an attorney in order to preserve the attorney-client privilege; and
3) pursuant to G.S. 143-318.11(a)(4), to discuss matter relating to the location or expansion of industries or other businesses in the area served by the public body, including agreement on a tentative list of economic development incentives that may be offered by the public body in negotiations.

FINANCIAL IMPACT:

None.

Union County Government Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-317 **Agenda Date:** 6/1/2026

TITLE:

Public Hearing - County Manager's Proposed Fiscal Year 2027 Budget

INFORMATION CONTACT:

Jason May, Budget & Grants Management, Director, 704-283-3760

ACTION REQUESTED:

Hold a Public Hearing.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

In accordance with North Carolina General Statutes, Union County is required to present and hold a public hearing on the proposed budget for the upcoming fiscal year. The County Manager will present the recommended Fiscal Year 2026-2027 Operating and Capital Budget that outlines the County's financial plan for delivering essential services, funding infrastructure needs, and supporting community priorities.

The budget reflects a commitment to responsible fiscal management, strategic investment, and maintaining high-quality service delivery across all departments. The public hearing provides an opportunity for residents, stakeholders, and elected officials to review and provide feedback on the proposed plan prior to its adoption.

FINANCIAL IMPACT:

None.

AFFP

PUBLIC NOTICE NOTICE IS GIVE

Affidavit of Publication

STATE OF NC }
COUNTY OF } Union SS

Kimberly Cook, being duly sworn, says:

That she is Billing Clerk of the The Enquirer Journal, a daily newspaper of general circulation, printed and published in Monroe, County, NC; that the publication, a copy of which is attached hereto, was published in the said newspaper on the following dates:

May 20, 2026

That said newspaper was regularly issued and circulated on those dates.
SIGNED:

Kimberly Cook
Billing Clerk

Subscribed to and sworn to me this 20th day of May 2026.

Barbara M Daniels
Barbara M Daniels, Notary, Guilford , County, NC

My commission expires: March 06, 2027

BARBARA M DANIELS NOTARY PUBLIC GUILFORD COUNTY, N.C.

00003753 71483595

EJ
UNION COUNTY GOVERNMENT--LYNN WEST
500 N MAIN STREET
ROOM 921
MONROE, NC 28112

PUBLIC NOTICE

NOTICE IS GIVEN that the Union County Board of Commissioners will hold a public hearing to receive comments on the proposed FY 2027 Operating and Capital Budget at 6:00 p.m. on Monday, June 1, 2026, in the Commissioners' Board Room, first floor, Union County Government Center, 500 North Main Street, Monroe, North Carolina.

This hearing will also include the Union County Board of Commissioners receiving comments on the proposed appropriations in the County's FY 2027 budget document which are for economic development purposes.

A copy of the proposed FY 2027 Operating and Capital Budget document has been submitted to the Union County Board of Commissioners and is available for public inspection in the Office of Budget Management, Suite 700, Union County Government Center, 500 North Main Street, Monroe, North Carolina 28112; in the Office of the Clerk to the Board of Commissioners, Ninth Floor, Room 932, Union County Government Center, 500 North Main Street, Monroe, North Carolina 28112; and on-line at

https://www.unioncountync.gov/government/departments-a-e/budget. (Public computers are available at the Monroe Main Library, as well as at certain other library branches).

Any person requesting a sign language interpreter or any person requesting any other special assistance needed due to a disability under the Americans with Disabilities Act should call (704) 283-3853 and make a request at least 96 hours in advance.

Lynn G. West, Clerk to
the Board of Commissioners

May 20, 2026

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-244 **Agenda Date:** 6/1/2026

TITLE:

GFOA Distinguished Budget Award

INFORMATION CONTACT:

Jason May, Budget and Grants Management, Director, 704-283-3760

ACTION REQUESTED:

Recognize the Union County Budget Management team for receiving the Government Finance Officers Association's (GFOA) Distinguished Budget Presentation Award.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Government Finance Officers Association of the United States and Canada has announced that Union County has received the GFOA's Distinguished Budget Presentation Award for its FY2026 budget.
In order to receive this award, Union County had to satisfy nationally recognized guidelines for effective budget presentation. These guidelines are designed to assess how well an entity's budget serves as a policy document, financial plan, operations guide, and communications device. Budget documents must be rated "proficient" in all four categories, and the fourteen mandatory criteria within those categories, to receive the award. This is the thirteenth consecutive year the Union County Budget Management department has received this award.

FINANCIAL IMPACT:

None.

Government Finance Officers Association
203 North LaSalle Street, Suite 2700
Chicago, Illinois 60601-1210
312.977.9700 *fax:* 312.977.4806

December 23, 2025

Jason May
Director, Budget & Grants Management
Union County, North Carolina

Dear Jason:

A panel of independent reviewers have completed their examination of your Annual budget document for the period beginning July 2025. We are pleased to inform you that your budget document has been awarded the Distinguished Budget Presentation Award from Government Finance Officers Association (GFOA). This award is the highest form of recognition in governmental budgeting. Its attainment represents a significant achievement by your organization.

Your Distinguished Budget Presentation Award is valid for one year. To continue your participation in the program, it will be necessary to submit your next budget document to GFOA within 90 days of the proposed budget's submission to the legislature or within 90 days of the budget's final adoption.

Your electronic award package contains the following:

- **Scores and Comments**. Each entity submitting a budget to the program is provided with reviewers' scores for each of the categories on which the budget document was judged along with reviewers' confidential comments and suggestions for possible improvements to the budget document. We urge you to carefully consider these suggestions as you prepare your next budget.
- **Budget Award**. A camera-ready reproduction of the Award is included for inclusion in your next budget. If you reproduce the camera-ready image in your next budget, it should be accompanied by a statement indicating continued compliance with program criteria. Please refer to the instructions for reproducing your Award in your next budget (also included in your award package).
- **Certificate of Recognition**. When a Distinguished Budget Presentation Award is granted to an entity, a Certificate of Recognition for Budget Presentation is also presented to the individual(s) or department designated as being primarily responsible for its having achieved the award.
- **Sample press release.** Attaining this Award is a significant accomplishment. The sample press release may be used to give appropriate publicity to this notable achievement.

In addition, award recipients will receive via mail either a plaque (if the government is a first-time recipient or has received the Award fifteen times since it received its last plaque) or a brass medallion to affix to the plaque.

We appreciate your participation in this program, and we sincerely hope that your example will encourage others in their efforts to achieve and maintain excellence in governmental budgeting. The most current list of award recipients can be found on GFOA's website at www.gfoa.org. If we can be of further assistance, please contact the Awards Programs staff at (312) 977-9700.

Sincerely,

Michele Mark Levine

Michele Mark Levine
Director, Technical Services Center

GOVERNMENT FINANCE OFFICERS ASSOCIATION

Distinguished Budget Presentation Award

PRESENTED TO

Union County
North Carolina

For the Fiscal Year Beginning

July 01, 2025

Christopher P. Morrill

Executive Director

The Government Finance Officers Association of the United States and Canada

presents this

CERTIFICATE OF RECOGNITION FOR BUDGET PREPARATION

to

Budget & Grants Department

Union County, North Carolina

The Certificate of Recognition for Budget Preparation is presented by the Government Finance Officers Association to those individuals who have been instrumental in their government unit achieving a Distinguished Budget Presentation Award. The Distinguished Budget Presentation Award, which is the highest award in governmental budgeting, is presented to those government units whose budgets are judged to adhere to program standards.

Executive Director Christopher P. Morrill

Date: **12/23/2025**

File #: 26-274 **Agenda Date:** 6/1/2026

TITLE:

Recognize 2026 Bobby Cobb Award Recipient

INFORMATION CONTACT:

Patrick Niland, County Manager's Office, Deputy County Manager, 704-283-3630

ACTION REQUESTED:

Recognize Program Manager for the Behavioral Health Collaborative, Christina Neal, as this year's Bobby Cobb Award Recipient.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County's Program Manager for the Behavioral Health Collaborative, Christina Neal, has received the 2026 Bobby Cobb Award, presented annually to employees who make a meaningful impact across departments or community groups. Neal's leadership in launching cross-departmental mental health initiatives and establishing partnerships with local organizations exemplifies the spirit of the award through her dedication to improving services for Union County residents.

Over the past eight years, Neal has played a pivotal role in building the county's Behavioral Health Collaborative, transforming it from an initial concept into a comprehensive program that supports students and families. The Collaborative, developed in partnership with Union County Public Schools (UCPS), expands access to behavioral health resources and creates a coordinated system of care for young people.

Neal's influence extends beyond program development. As a dedicated leader, she has organized ongoing professional development for her team of social workers and behavioral health professionals, improved crisis response protocols, and ensured staff are equipped with tools and resources for success, frequently stepping in to support her team during challenging situations.

The Bobby Cobb Award was established in 2022 in memory of Bobby Cobb, a dedicated Public Health employee who served Union County for many years. Cobb was crucial in supporting the County through the COVID-19 pandemic, acting as the primary point of contact for all county employees. He provided essential guidance, resources and information to every department. His unwavering commitment to public service had a lasting impact on Union County. This award continues to honor his legacy by recognizing employees who demonstrate exceptional dedication and service.

FINANCIAL IMPACT:

None.

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-301 **Agenda Date:** 6/1/2026

TITLE:

FY2027 Catawba River Water Treatment Plant Budget

INFORMATION CONTACT:

Hyong Yi, Union County Water, Administrator, 704-296-4212

ACTION REQUESTED:

Approve annual Catawba River Water Treatment Plant (CRWTP) Budget for FY2027.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Section 3.10 of the Catawba River Water Supply Project (CRWSP) Joint Venture Agreement requires the annual budget to be approved by the Union County Board of County Commissioners. The annual budget is developed based on projected water demand from Lancaster Water and Sewer District and Union County Water and the cost for chemicals, equipment, and labor. These costs are then apportioned to the Lancaster Water and Sewer District or Union County based on our water demand. The budget is approved by the governing board for the CRWSP before it is sent to the two owners for their approval per Section 3.10 of the joint venture agreement.

For FY2027, the budget is projected to increase by $629,625 from $8.04 million to $8.67 million. Significant increases include: the cost of chemicals ($125,000), maintenance ($245,000), and labor expense ($244,500). A copy of the FY2027 budget breakdown for the CRWSP is attached.

FINANCIAL IMPACT:

Union County Water budgets each year to purchase water from the CRWSP based on the budget proposed by CRWSP.

CRWSP Operating Budget 2027 Breakdown Spread sheet								
Chemicals	2026	Current spent	Year end Projection	2027	Difference	FY26 chemical cost	FY27 chemical cost	% Budget Change
	Budgeted	1/1/2026	as of 1/1/26	proposed	Budgeted vs Proposed	Projections	Projections	FY26 to FY27
alum	$ 420,000	$ 172,640	$ 420,000	$ 420,000	$ -	$385/ton	$445/ton	0.0%
ammonia	$ 180,000	$ 76,624	$ 180,000	$ 180,000	$ -	$1.84/lbs	1.98/lbs	0.0%
bleach	$ 630,000	$ 281,201	$ 630,000	$ 690,000	$ 60,000	$1.70/gal	$1.70/gal	9.5%
Carbon	$ 275,000	$ 191,818	$ 275,000	$ 325,000	$ 50,000	$1.61/lbs	$1.72/lbs	18.2%
caustic	$ 130,000	$ 42,586	$ 100,000	$ 90,000	$ (40,000)	$3.57/gal	$2.23/gal	-30.8%
citric acid	$ -	$ -	$ -	$ -	$ -	$20.98/gallon	$20.98/gallon	#DIV/0!
copper sulfate	$ 160,000	$ 75,364	$ 160,000	$ 180,000	$ 20,000	$17.45/gal	$18.27/gal	12.5%
dechlor	$ 30,000	$ 21,597	$ 40,000	$ 45,000	$ 15,000	5.47/gal	$6.06/gal	50.0%
fluoride	$ 80,000	$ 28,896	$ 80,000	$ 85,000	$ 5,000	$.24/lbs	$.24/lbs	6.3%
muriatic acid	$ 60,000	$ 26,231	$ 60,000	$ 70,000	$ 10,000	$323/ton	$397.15/ton	16.7%
phosphates	$ 200,000	$ 64,533	$ 160,000	$ 200,000	$ -	$.71/gal	$.72/gal	0.0%
polymers	$ 17,000	$ 140	$ 17,000	$ 20,000	$ 3,000	$5.92lbs	$5.92/lbs	17.6%
sodium chlorite/acid	$ 247,000	$ 95,523	$ 247,000	$ 247,000	$ -	$7.38/gallon	$7.38/gallon	0.0%
sulfuric acid	$ 5,500	$ 2,929	$ 7,000	$ 7,500	$ 2,000	$3.80/gallon	$5.08/lbs	36.4%
Other	$ -	$ -	$ -	$ -	$ -	$ -	$ -	#DIV/0!
Totals	$ 2,434,500.00	$ 1,080,082	$ 2,376,000	$ 2,559,500	$ 125,000			5.1%
Contracted Services								
audit	$ 21,000	$ 21,000	$ 21,000	$ 22,000	$ 1,000			4.8%
engineering	$ 41,000	$ -	$ 41,000	$ 40,000	$ (1,000)			0
legal	$ 50,000	$ 6,693	$ 50,000	$ 50,000	$ -			0
Totals	$ 112,000	$ 27,693	$ 112,000	$ 112,000	$ -			0.0%
Energy	$ 1,885,000	$ 607,554	$ 1,700,000	$ 1,885,000	$ -			0.0%
Fuels/Lubricates	$ 16,797	$ 6,633	$ 20,000	$ 22,000	$ 5,203			31.0%
Insurance	$ 24,000	$ 12,676	$ 24,000	$ 28,000	$ 4,000			16.7%
Labor Expense								
drug testing	$ 2,000	$ 375	$ 2,000	$ 2,000	$ -			0.0%
mileage	$ 2,500	$ 966	$ 2,500	$ 3,000	$ 500			20.0%
Torte/auto/admin	$ 6,000	$ 900	$ 5,000	$ 7,000	$ 1,000			16.7%
PEBA/workers comp	$ 480,000	$ 216,503	$ 460,000	$ 480,000	$ -			0.0%
Medical Insurance	$ 350,000	$ 124,193	$ 350,000	$ 350,000	$ -			0.0%
Payroll taxes	$ 130,000	$ 57,701	$ 120,000	$ 130,000	$ -			0.0%
OPEB	$ 42,000	$ 18,241	$ 42,000	$ 45,000	$ 3,000			7.1%
Salaries/OT	$ 1,850,000	$ 891,120	$ 1,850,000	$ 2,090,000	$ 240,000			13.0%
Totals	$ 2,862,500	$ 1,309,999	$ 2,831,500	$ 3,107,000	$ 244,500			8.5%
Lab Supplies								
contracted labs	$ 45,000	$ 13,158	$ 45,000	$ 45,000	$ -			
general	$ 80,000	$ 25,773	$ 70,000	$ 70,000	$ (10,000)			
fees	$ 2,000	$ 330	$ 2,000	$ 2,000	$ -			
service contracts	$ 60,000	$ 15,350	$ 60,000	$ 65,000	$ 5,000			
Totals	$ 187,000	$ 54,611	$ 177,000	$ 182,000	$ (5,000)			-2.7%
*Maintenance								
building	$ 35,000	$ 29,070	$ 50,000	$ 50,000	$ 15,000			
chem feed	$ 50,000	$ 50,377	$ 90,000	$ 68,000	$ 18,000			
electrical	$ 60,000	$ 22,403	$ 70,000	$ 70,000	$ 10,000			
general	$ 55,000	$ 32,109	$ 55,000	$ 55,000	$ -			
heavy equipment	$ 3,000	$ 4,390	$ 5,000	$ 5,000	$ 2,000			
landscape	$ 120,000	$ 32,604	$ 120,000	$ 120,000	$ -			
pumps	$ 13,000	$ -	$ 13,000	$ 13,000	$ -			
scada	$ 10,000	$ -	$ 10,000	$ 10,000	$ -			
vehicle	$ 3,000	$ 225	$ 3,000	$ 3,000	$ -			
**Equipment replacement	$ -	$ -	$ -	$ 200,000	$ 200,000			
Totals	$ 349,000	$ 171,178	$ 416,000	$ 594,000	$ 245,000			70.2%
Office Supplies								
bank fees	$ 1,143	$ 99	$ 500	$ 544	$ (599)			
board meetings	$ 2,000	$ 431	$ 2,000	$ 2,500	$ 500			
computers	$ 25,000	$ 13,148	$ 30,000	$ 30,000	$ 5,000			
copiers/printers	$ 4,707	$ 1,842	$ 5,000	$ 6,000	$ 1,293			
dues/licenses	$ 10,000	$ 4,882	$ 10,000	$ 10,000	$ -			
first aid supplies	$ 300	$ -	$ 300	$ 300	$ -			
general	$ 24,000	$ 11,405	$ 24,000	$ 24,000	$ -			
janitorial	$ 7,000	$ 3,489	$ 10,000	$ 10,000	$ 3,000			
po box fee	$ 160	$ 154	$ 154	$ 160	$ -			
Postage	$ 1,500	$ 335	$ 1,200	$ 1,228	$ (272)			
safety equipment	$ 5,000	$ 108	$ 5,000	$ 5,000	$ -			
telephone	$ 15,000	$ 6,131	$ 17,000	$ 17,000	$ 2,000			
training/travel	$ 16,000	$ 5,019	$ 16,000	$ 16,000	$ -			
uniforms	$ 9,500	$ 3,225	$ 9,500	$ 9,500	$ -			
Totals	$ 121,310	$ 50,268	$ 130,654	$ 132,232	$ 10,922			9.0%
Sales tax	$ 4,245	$ 1,159	$ 4,245	$ 4,245	$ -			0.0%
Water Man. Group	$ 48,248	$ 48,248	$ 48,248	$ 48,248	$ -			0.0%
Budget Total	$ 8,044,600	$ 3,370,101	$ 7,839,647	$ 8,674,225	$ 629,625	7.8%		7.8%
					Balance	$ -		

CRWSP Operating Budget FY 2027

	2026	YTD	2026	2027	FY27 Proposed vsFY26 Projected		FY27 Proposed vs FY26 Budget	
	Budget	1/1/2026	Projected Expenditures	Proposed	%	$	%	$
Chemicals	$ 2,434,500	$ 1,080,082	$ 2,376,000	$ 2,559,500	7.7%	$ 183,500	5.1%	$ 125,000
Contracted Services	$ 112,000	$ 27,693	$ 112,000	$ 112,000	0.0%	$ -	0.0%	$ -
Energy	$ 1,885,000	$ 607,554	$ 1,700,000	$ 1,885,000	10.9%	$ 185,000	0.0%	$ -
Fuels/Lubricates	$ 16,797	$ 6,633	$ 20,000	$ 22,000	10.0%	$ 2,000	31.0%	$ 5,203
Insurance	$ 24,000	$ 12,676	$ 24,000	$ 28,000	16.7%	$ 4,000	16.7%	$ 4,000
Labor Expense	$ 2,862,500	$ 1,309,999	$ 2,831,500	$ 3,107,000	9.7%	$ 275,500	8.5%	$ 244,500
Lab Supplies	$ 187,000	$ 54,611	$ 177,000	$ 182,000	2.8%	$ 5,000	-2.7%	$ (5,000)
Maintenance	$ 349,000	$ 171,178	$ 416,000	$ 594,000	42.8%	$ 178,000	70.2%	$ 245,000
Office Supplies	$ 121,310	$ 50,268	$ 130,654	$ 132,232	1.2%	$ 1,578	9.0%	$ 10,922
Sales tax	$ 4,245	$ 1,159	$ 4,245	$ 4,245	0.0%	$ -	0.0%	$ -
Water Mangt Group	$ 48,248	$ 48,248	$ 48,248	$ 48,248	0.0%	$ -	0.0%	$ -
Totals	$ 8,044,600	$ 3,370,101	$ 7,839,647	$ 8,674,225	10.6%	$ 834,578	7.8%	$ 629,625

FY26 projected Flow est. (mgd)	23.20							$ -
			Production Change	4.5%				
FY27 Projection est. (mgd)	24.25		Cost per 1000gals	$ 0.98				
						FY26 Projected flow	23.20mgd	
LCWSD Projection FY 27	$4,632,215		12.95 MGD @ 98 cents/1000	cents/1000 gallons				
UC Projection FY 27	$4,042,010		11.30 MGD @ 98 cents/1000	cents/1000 gallons				
						FY 27 Projected flow average	24.25mgd	
Total (Operations)	$ 8,674,225		@	0.98/1000 gallons				
Capital Replacement	$ 265,538		@	0.03/1000 gallons		FY27 Projection is 1.05mgd more than FY26		
Cash Shortfall Account (CSA)	$ 177,025		@	0.02/1000 gallons				
Grand total	$ 9,116,788		@	1.03/1000 gallons				

2027 Proposed Budget Explanations

Line Item		Increase	Percentage
Chemicals	*Overall chemical cost increase/demands increase*	$ 125,000	5.1%
Contract Services	*No change*	$ -	0.0%
Energy	*No change*	$ -	0.0%
Fuels Lubricates	*Increased maintenance run of generators/outages*	$ 5,203	31.0%
Insurance	*Overall cost increases for coverage*	$ 4,000	16.7%
Labor Expense	*COLAS, PEBA ,Insurance, Merit, salary fill vacancy (possible overhire)*	$ 244,500	8.5%
Lab Expenditures	*Decrease in General supplies*	$ (5,000)	-2.7%
*Equip. Replacement new line item	*Includes 2 vehicles (est. $110,000) and $90,000 for general repair/replace*	$ 200,000	100.0%
Maintenance (All other line items)	*Increase due to materials and labor costs*	$ 45,000	13.0%
Office Supplies	*Increase in computer/ contract and licenses and janitorial supplies*	$ 10,922	9.0%
Sales Tax	*No change*	$ -	0.0%
Water MGTGroup	*No Change*	$ -	0.0%

*Maintenance	Total increase for Maintenance is 70.2%
**Equip. Replacement new line item	*Includes 2 vehicles (est. $110,000) & $90,000 for general repair/replace*
	Old vehicles will be sold on gov.deals and money put in CRWSP funds

Operations (cost/1000)	$ 88,512.50

First Citizens Account Balances for CRWSP	as of 1/1/2026
General Fund Checking Account	$1,282,440
Capital Replacement Fund 1	$241,766
Capital Replacement Fund 2	$1,039,346
Capital Replacement Fund 3	$1,676,182
CRF Total	$ 2,957,294.00

Cash Shortfall Account	$494,070

Max CRF	$4,500,000
Max CSA	NA
Min CSA	$1,200,000

File #: 26-294 **Agenda Date:** 6/1/2026

TITLE:

Contract - Biosolids Master Plan

INFORMATION CONTACT:

John Shutak, Union County Water, Engineering Director, 704-283-3651

ACTION REQUESTED:

Authorize the County Manager to 1) negotiate and execute an agreement with Black & Veatch International Company substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Capital Improvement Program for Union County Water (UCW) includes an annual allocation for Water Reclamation Facility (WRF) rehabilitation. The Biosolids Master Plan is necessary to develop a long-term, sustainable strategy for managing the biosolids generated at UCW's five WRFs.

Black & Veatch International Company has been selected to provide engineering services for Task Order 10021-01: Biosolids Master Plan. Black & Veatch International Company was chosen from a list of vendors previously selected from RFQ 2026-002 - Engineering Services for Water Reclamation Facility Improvements to provide these services for Union County Projects.

FINANCIAL IMPACT:

The total cost of Task Order 10021-01 with Black & Veatch International Company is $1,229,500.00. Sufficient funds are available within the adopted capital account 60185101 - WRF Biosolids Master Plan.

TASK ORDER No. 10021-01

This Task Order pertains to an Agreement by and between UNION COUNTY, NC ("OWNER"), and BLACK & VEATCH INTERNATIONAL COMPANY ("ENGINEER"), dated JANUARY 16, 2026, ("the Agreement"). ENGINEER shall perform services on the project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order shall supplement the Agreement as it pertains to the project described below. Unless otherwise defined herein, all capitalized terms shall have the meaning set forth in the Agreement.

MPA: 10021

TASK ORDER NUMBER: 10021-01

RELATED RFQ NUMBER: 2026-002

PROJECT NAME: BIOSOLIDS MASTER PLAN

PART 1.0 PROJECT DESCRIPTION

Union County (OWNER) owns and operates five (5) water reclamation facilities (WRFs), with treatment capacities ranging from 0.5 MGD to 7.5 MGD. Its largest facility, the Twelve Mile WRF, is currently being expanded from 7.5 MGD to 9 MGD, with construction expected to be completed in 2027. In addition, the Grassy Branch WRF is being expanded to 0.12 MGD, with construction scheduled for completion in 2026. The following are the WRFs owned and operated by OWNER with their permitted capacity.

Water Reclamation Facility	PermittedCapacity (MGD)	Biosolids Processes
Twelve Mile Creek WRF	7.5 (Expanding to 9.0)	Aerobic digestion, dewatering with BFPs and hauling Class B solids to McGill for composting (Currently dewatering raw solids and hauling to McGill)
Crooked Creek WRF	1.9	Treatment with lime slurry and liquid Class B land application
Olde Sycamore WRF	0.15	Hauled to Crooked Creek
Tallwood WRF	0.05	Hauled to Crooked Creek
Grassy Branch WRF	0.05 (Expanding to 0.12)	Hauled to Crooked Creek

To meet increasing wastewater treatment needs, OWNER has engaged ENGINEER to develop a long-term, sustainable biosolids management strategy for all five (5) WRFs. In general, the scope will accomplish the following:

- Develop a planning framework that evaluates existing conditions, forecasts future biosolids quantities, and assesses end-use options.
- Conduct solution development and evaluation, including screening potential technologies and develop and evaluate alternatives.
- Prepare an implementation strategy that includes long-term recommendations, a capital improvement plan (CIP), project prioritization and sequencing, and validation of the recommended path forward with OWNER.

PART 2.0 SCOPE OF BASIC SERVICES TO BE PERFORMED BY ENGINEER ON THE PROJECT

The detailed scope of services is for Basic Services is as follows:

Task 100. Framework Definition

ENGINEER will provide the following services under this task.

Subtask 101 Kickoff Meeting: ENGINEER will conduct a project Kickoff Meeting with OWNER to set overall objectives for the project and discuss roles, responsibilities, scope, schedule, deliverables, budget, safety, quality plan, assumptions, data request, and communication plan. ENGINEER will lead the Biosolids Master Plan project Kickoff Meeting including development and distribution of agenda and meeting minutes. The Kickoff Meeting will be conducted as a hybrid in-person / virtual meeting and attended by up to seven (7) of ENGINEER's professionals.

Subtask 102 Data Collection and Review: Prior to the Kickoff Meeting, ENGINEER will submit a preliminary data request which will be discussed at the Kickoff Meeting. This request will be refined and resubmitted based on discussion at the Kickoff Meeting and as the project progresses. The status of data transmittals will be tracked by ENGINEER throughout the project. ENGINEER will list the data provided by OWNER in a project "Data Catalog" spreadsheet. Data may include, but are not limited to, the following to which OWNER reasonably has access:

- Process flow diagrams
- Facility operations logs
- Annual biosolids reports
- Influent and/or effluent flows for each biosolids unit processes such as thickening, stabilization, dewatering for the last five (5) years
- Laboratory biosolids data including total solids (TS), volatile solids (VS), nutrients, pathogens, metals, etc. for the last three (3) to five (5) years
- Biosolids hauling and disposal records for the last five (5) years
- Previous master plans and studies on biosolids treatment processes
- Descriptions and status of related current, and upcoming projects
- As-builts
- Any applicable permits and proposed permit changes
- Operating costs including electricity, chemicals such as polymer, natural gas, and labor for use in preparing opinions of cost.

ENGINEER will review the information to glean a general understanding of current program conditions. ENGINEER will identify any significant data gaps. In the absence of data, ENGINEER will apply generally acceptable parameters based on typical equipment performance and standard conversion factors, based on experience, for any evaluations.

Subtask 103 Operations Evaluation: ENGINEER will conduct an up to 3-day site visit consisting of plant staff interviews and basic visual inspection to observe shift operations and understand daily operations and future needs, including:

- Operational and maintenance needs and requirements
- Infrastructure capacity and condition (using information gathered by the team in Subtask 102).
- Gap assessment – identify any gaps in existing operations and opportunities for future improvements in alignment with OWNER's strategic goals.
- Data gap analysis - evaluate whether existing biosolids data is sufficient to support future regulatory compliance, operational optimization, and long-term biosolids management.

Subtask 104 Regulatory and Policy Review: ENGINEER will review existing local (if applicable), state and federal regulations related to biosolids management, as well as regulatory trends. The primary objective of this review is to identify the near-term and long-term factors that may impact the management of biosolids, and to identify potential operational or process changes that may be required to comply with these regulations. The emphasis will be on the emerging issues and trends in the state and around the country that could affect future solids management.

Subtask 105 Biosolids Production Forecast

In consultation with Union County Water Planning and Resource Management staff, ENGINEER will review already developed population projections for OWNER's service area. If any flow projections were performed, ENGINEER will review that information. The population projection data will be utilized to extrapolate flow for the 5-, 10-,15- and 20- year planning horizons based on the influent flow to population ratio estimated from the historical data collected under Subtask 102.

Based on the review of historical data in Subtask 102, ENGINEER will determine current solids production rates in pounds of solids per million gallon of influent flow. Biosolids production will be forecasted based on the historical production rates and flow projections. A solids mass balance and a flow balance will be developed to evaluate capacity of the existing equipment under existing and projected future conditions.

Assumptions:

- OWNER will provide the population projections for the planning horizons. ENGINEER is not expected to develop land use or similar analysis to develop population projections.

- ENGINEER will not develop or update a process model such as BioWin, Sumo, GPS-X, etc. for this task.

Existing data provided by the OWNER will be the basis for calculations. Should additional sampling needs be identified, the ENGINEER has included an allowance to support supplemental data collection under Task 500.

Subtask 106 Existing System Assessment: ENGINEER will document OWNER's current biosolids management approach and the biosolids processing systems at the facility. This evaluation will include characterization of the biosolids, and management program based on available data and an assessment of the historical operations of the existing biosolids treatment systems. Historical biosolids data will be requested by ENGINEER to support this task as part of Subtask 102. This task includes the following processes and related equipment:

- Thickening
- Stabilization
- Dewatering
- Storage
- Hauling and end-use/disposal
- Sidestream Handling
- Chemical Storage (related to biosolids processes such as thickening and dewatering)

Projections for solids quantities and characteristics that will serve as the basis for development and evaluation of alternatives will be estimated using the future flows and loads that are developed under Subtask 105.

Subtask 107 End Use Options/Market Assessment: ENGINEER will review current and potential future biosolids end use options in the region. This will include current markets for traditional biosolids products (Class A, and Class B liquid, cake, compost, dried products, etc.) and the potential future of these markets. The assessment will identify: target markets; approximate total market size; and market opportunities/constraints, including PFAS limitations (based upon limited interviews with users, influencers and/or distributors). The objective of this effort is to identify resilient markets for OWNER's biosolids as a foundation for future solids processing needs. End-use options will be kept within an approximate 3-hour driving radius of OWNER's facilities.

Subtask 108 Framework Definition Workshop: ENGINEER will prepare for and attend one 3-hour workshop with OWNER to review and discuss the results and recommendations from Task 100. This will be a hybrid in-person / virtual meeting and attended by up to five (5) of ENGINEER's professionals. ENGINEER will prepare an agenda for this workshop and will prepare meeting minutes summarizing the key discussion points from the workshop.

Subtask 109 Technical Memorandum No.1: ENGINEER will develop a technical memorandum (TM) presenting the findings from Task 100 (Subtask 102 through Subtask

107). The TM will be submitted in draft for review by and discussion with OWNER. OWNER's comments will be addressed in the Biosolids Master Plan.

Subtask 1010 Assess Regionalization Opportunities: ENGINEER, with input from OWNER, will identify potential neighboring agencies that could be interested in regional processing opportunities. ENGINEER will prepare a preliminary list of agencies and their current solids management practice. Identified agencies will be contacted to confirm solids management practices, identify approximate solids production or available excess solids processing capacities, and determine potential interest in regionalization.

For budgeting purposes, up to six (6) meetings are anticipated to engage nearby agencies. High-level findings related to potential partnerships will be incorporated into Task 200, Solution Development and Evaluation.

Deliverables:

- Meeting Agenda
- Draft/Final Meeting Minutes including presentation slides
- Draft Framework Definition Technical Memorandum

Task 200. Solution Development and Evaluation
ENGINEER will provide the following services under this task.

Subtask 201 Development of Screening and Evaluation Criteria: ENGINEER will prepare a summary of recommended screening and evaluation criteria and an approach for applying the criteria to be used in the screening of biosolids management practices and in the evaluation of alternatives. Prior to developing the summary, ENGINEER will meet with OWNER staff to obtain input into the criteria that are most important to OWNER and the approach for applying the criteria. It is expected that some high-level criteria may be used in the screening of practices and technologies. Examples of "pass/fail" criteria for screening include proven systems, compatibility of process with existing liquid treatment train or product quality. Draft criteria will be submitted for OWNER consideration and finalized with OWNER's input.

A larger set of criteria will be developed to enable a quadruple bottom line (QBL) analysis of alternatives. QBL criteria will be developed for the following categories: financial, social, environmental, and functional. ENGINEER will prepare a preliminary list of potential criteria that will be submitted to OWNER for review, and ENGINEER will meet with OWNER to discuss and modify the criteria list. This will be virtual meeting and attended by up to three (3) of ENGINEER's professionals.

Once the evaluation criteria are defined, ENGINEER will prepare an online questionnaire that will be used by OWNER to provide input on the weighting of the criteria. A link will be sent to all participants for a survey form that will guide participants through a series of questions. Responses from the questions will be used by ENGINEER in an algorithm to develop composite weighting factors for review by OWNER.

The criteria summary will include definitions for each of the proposed criteria and the approach for using them. This summary will be submitted as a TM to OWNER for review prior to the review of biosolids management practices and technologies and subsequent workshops. The TM will be submitted in draft for review by and discussion with OWNER. OWNER's comments will be addressed in the Biosolids Master Plan.

Deliverables:

- Draft Screening and Evaluation Criteria Technical Memorandum

Subtask 202 Technology Overview and Screening: ENGINEER will compile information regarding available technologies informed by findings under Task 100 including regulatory overview and market study. ENGINEER will consider a broad range of treatment technologies including but not limited to thermal hydrolysis, drying and thermal oxidation (such as incineration, pyrolysis and gasification) , for PFAS destruction. A summary table identifying potentially suitable technologies will be developed and provided to the OWNER to document the broad range of approaches that will be considered where "technologies" refer to the major treatment technologies needed to render the biosolids suitable for final use. ENGINEER will provide OWNER with information regarding available technologies, including the state of the technology with respect to practice and suitability based on capacity, costs, complexity, and other factors. Information will be summarized in a presentation file to provide OWNER staff with an overview of key information to support the subsequent screening process.

Information developed for this task will be presented and discussed with the OWNER in a workshop format. The objective will be to screen technologies to eliminate those that are not considered suitable using the criteria developed under Subtask 201. ENGINEER will prepare for and participate in a 3-hr workshop with OWNER that will include the following topics. This will be a hybrid in-person / virtual meeting and attended by up to five (5) of ENGINEER's professionals.

- Overview of technologies, including state of the practice, applicable capacity, complexity, flexibility, consistency with OWNER's goals/vision, and other relevant factors.
- Facilitation of an initial screening exercise based on the criteria and approach identified in the prior tasks to rule out any technology options that are not considered viable or do not align with OWNER's goals or needs.

Following the screening workshop, ENGINEER will submit meeting minutes to OWNER to document the discussions, decisions and action items discussed during the workshop. The minutes prepared for this workshop will be of sufficient detail to capture how and why decisions are made and thoroughly document the decision-making process.

Deliverables:

- Meeting Agendas

- Draft/Final Meeting Minutes including presentation slides

Subtask 203 Alternatives Identification Workshop: ENGINEER will conduct an Alternatives Identification Workshop with the OWNER to review the shortlisted technologies and to determine which alternatives should be developed further for evaluation. This will be a maximum 1.5-hr, hybrid in-person / virtual meeting and attended by up to five (5) of ENGINEER's professionals. During the workshop, a list of all potential alternatives, considering shortlisted technologies, will be reviewed to develop up to four (4) viable system-wide alternatives for further development and analysis. The goal is to reach a consensus on the basis for each process train before proceeding with alternatives development. The alternatives considered may include, but are not limited to:

- Maintaining current approach including potential intensification of existing processes
- Stabilization for Class A or Class B liquid land application
- Stabilization for Class A or Class B cake land application
- Composting
- Drying
- Other processes as identified through Task 202

Deliverables:

- Meeting Agenda
- Draft/Final Meeting Minutes including presentation slides

Subtask 204 Alternatives Development and Evaluation: ENGINEER will build on the information from Subtask 202 and Subtask 203 collaboratively with the OWNER, to refine and assess up to four shortlisted biosolids treatment alternatives including status quo. ENGINEER will submit a draft description consisting of basic process flow diagrams showing the major elements of the proposed shortlisted options for OWNER review, comments, and agreement on proceeding with development and evaluations of the proposed shortlisted options.

ENGINEER will develop conceptual design criteria and calculate lifecycle costs, including capital, operations, maintenance, and present worth, to support the evaluation of each alternative. The following are major subtasks:

- Design criteria including process flow diagrams (PFDs) with mass and energy balances, as appropriate;
- Solids handling and processing equipment requirements for each alternative;
- Projected chemical consumption and utility requirements;
- Developing site layouts; and
- Alternatives cost development including operational and maintenance costs (chemical usage, transportation, gas production, etc.), and capital improvements to develop a life cycle cost.

Further, alternatives evaluated may consider centralized biosolids treatment, partnership with other organizations or neighboring utilities, nutrient recovery strategies (including planning-level/baseline side stream loading modeling), and energy recovery options as part of the analysis as necessary.

Following the alternatives development, ENGINEER will preliminarily score each alternative based on the feedback received from OWNER and with respect to QBL criteria (see Subtask 201 for evaluation criteria development) and appropriate weighting factors from prior tasks. This effort will provide a preliminary alternative ranking for OWNER's consideration. For the two top scoring alternatives, ENGINEER will examine how those alternatives are sensitive to key evaluation criteria such as changes to regulatory requirements, increase in life cycle cost, etc. The results of this sensitivity analysis will be used to identify trigger points for phasing approach during the implementation of the solutions.

Subtask 205 Alternatives Evaluation Workshop: ENGINEER will then conduct an Alternatives Evaluation Workshop with OWNER to review the results from the final development and evaluation of alternatives. This will be a maximum 3-hr, hybrid in-person / virtual meeting and attended by up to five (5) of the ENGINEER's professionals. Results of QBL analyses will be presented and discussed. Information will be summarized in a PowerPoint presentation for use in the workshop. Feedback from the OWNER will be used to adjust the evaluation accordingly.

Deliverables:

- Meeting Agendas
- Draft/Final Meeting Minutes including presentation slides

Subtask 206 Solution Development and Evaluation Technical Memorandum: The work completed as part of Subtask 202 through Subtask 205 will be documented in a TM. TM will summarize Subtask 202 and Subtask 203 efforts, including the technologies considered, the basis for the screening and development of alternatives, and the results of the alternatives evaluation under Subtask 204 and Subtask 205. The TM will be submitted in draft for review by and discussion with OWNER. OWNER's comments will be addressed in the Biosolids Master Plan.

Deliverables:

- Draft Solution Development and Evaluation TM

Subtask 207 Technology Witness Trips: ENGINEER shall attend up to two (2) technology witness trips (up to two (2) days each) to facilities utilizing alternative technologies identified during the evaluation, for the purpose of gathering general information related to operations and maintenance. It is assumed that up to two (2) ENGINEER's representatives will attend each trip along with OWNER's representatives. It is further

assumed that the trips will be within driving distance of OWNER's facilities. If a facility is located beyond a four (4)-hour driving radius, the ENGINEER will utilize personnel from the nearest local office; therefore, airfare expenses are not anticipated.

Task 300. Implementation

Implementation task will define the schedule for key decisions, tasks and identify CIP projects and develop costs.

Subtask 301 Strategy Development: Once a preferred biosolids management strategy is established under Task 200, ENGINEER will conduct additional analysis to better define the program elements and how they will develop over time and changing conditions. These strategy components will be presented for OWNER consideration in a workshop. to present the following.

- Operational Strategies – an analysis of staffing requirements and operational costs
- Define funding options – Evaluate potential funding sources and evaluate funding program eligibility based on funding program requirements and elements of the biosolids program.
- Develop performance monitoring framework

This will be a hybrid in-person / virtual meeting and attended by up to five (5) of ENGINEER's professionals.

Subtask 302 Capital Improvements Plan Development: ENGINEER will develop preliminary recommendations for biosolids management, identifying key implementation needs. Based upon both reviews of existing facilities and considering long-term recommended improvements, ENGINEER will develop a phased, operationally focused strategy to incrementally provide 1-5 year, 5-10 year, 10-15 year and 15-20 year improvements to solids management operations.

Detailed projects will be identified based on the findings and discussions from the prior tasks and a preliminary implementation schedule for the projects will be developed to address capacity, regulations, condition, and optimization of the facilities. Preliminary recommendations will be presented in a virtual meeting for OWNER's feedback before further refining implementation plans.

Subtask 303 CIP Cost Estimates: ENGINEER will develop planning level , AACE Class 5, capital cost opinions (in 2027 dollars) and will identify assumptions for the variety of types of improvements that will be recommended as part of the Biosolids Master Plan. Tables will be prepared to summarize cost information for the proposed improvement projects.

ENGINEER will review recent bid tabulations for similar improvement projects constructed by OWNER, other local utilities, and ENGINEER's cost library to develop unit costs for the recommended improvements identified in previous tasks. Encumbrance strategies will be customized to meet OWNER's needs and standards, and broken up between planning / design /construction phases. Additionally, escalation rate will be

included to adjust cost estimates for long-term projects. Typical escalation rate will be 4.5% annually and will be confirmed with OWNER.

Subtask 304 CIP Project Prioritization and Scheduling: ENGINEER will prioritize the recommended CIP projects, existing CIP projects and assessment recommendations provided by OWNER based on:

- Project Triggers (i.e., capacity, regulatory)
- Asset Condition (Risk/End of Useful Life)
- Cash Flow
- Alternatives Optimization

Subtask 305 CIP Schedule Validation Workshop: A workshop will be conducted with the OWNER's staff to review the projects list. This will be a hybrid in-person / virtual meeting and attended by up to five (5) of ENGINEER's professionals. The justification for each project will be reviewed and discussed. Opinions of probable project cost, the proposed implementation schedule and the project triggers will also be reviewed. During the workshop ENGINEER will also work with OWNER to balance the cash flow.

Subtask 306 Biosolids Master Plan Report: ENGINEER will document the project in a draft Biosolids Master Plan report. The report will summarize the final versions of the various technical memoranda prepared and the outcomes of the various workshops during previous phases of work. The report will describe the evaluations performed and the resulting recommendations. The report will provide recommendations for facility improvements year by year over the 20-year planning horizon. System maps and figures to support the recommendations and summarize the proposed improvements will be provided. One electronic copy of the draft Biosolids Master Plan report will be provided.

A workshop will be held to review the Biosolids Master Plan report and to discuss OWNER comments. This will be a hybrid in-person / virtual meeting and attended by up to five (5) of ENGINEER's professionals. The ENGINEER will prepare agenda and minutes. The minutes prepared for this workshop will be of sufficient detail to capture how and why decisions are made and thoroughly document the decision-making process.

ENGINEER will incorporate comments from the draft report review workshop and update the Biosolids Master Plan report to address these comments. Three hard copies and one electronic copy of the final report will be provided to OWNER.

Deliverables:

- Strategy Development Workshop (agenda and meeting minutes)
- CIP Schedule Validation Workshop (agenda and meeting minutes)
- Biosolids Master Plan Report (Draft and Final)
- Biosolids Master Plan Report Review Workshop (agenda and meeting minutes)

Task 400. Project Management

Subtask 401 General Project Management and Administration: ENGINEER will provide administration and management of the Project for a period of sixteen (16) months, anticipated to begin in May 2026 through September 2027, including monitoring budget and schedule and developing and overseeing quality assurance and quality control (QA/QC) plan.

Review progress with OWNER. Discuss issues with OWNER as they are noted.

Provide project management to coordinate activities of the project team and to provide overall Project direction to meet OWNER's objectives.

Prepare monthly invoices for ENGINEER's services in a format acceptable to OWNER.

Subtask 402 Progress Meetings: ENGINEER will conduct periodic Project progress meetings (assuming sixteen (16) meetings) with OWNER. It is assumed the progress meetings will be virtual. The purpose of the meetings will be to update OWNER's Project Manager and key team members on completed progress, budget, schedule, and to exchange ideas and information.

Project Deliverables:

- Monthly Invoice and Progress Reports

Task 500. Supplemental Data Collection and Testing Allowance:

During Task 100, or as needed to support OWNER's goals, supplemental testing may be performed, including Specific Oxygen Uptake Rate (SOUR) testing and other related parameters. Services may include development of a testing plan and protocols, on-site support to assist OWNER with testing activities, and analytical support through periodic virtual meetings to review results and data.

A $100,000 allowance is included to support these efforts. Upon authorization by OWNER and within the limits of the allowance, ENGINEER and OWNER shall mutually define the detailed scope, fee, and schedule for the requested services.

PART 3.0 ADDITIONAL SERVICES

ENGINEER will perform additional services as requested by OWNER. If the need for such services is identified, ENGINEER will prepare an amendment to this Task Order or prepare a new Task Order for OWNER's approval. Additional Services will be performed upon execution of the amendment or new Task Order.

- Additional services shall include, but are not limited to:

- Changes in the general scope, extent, or character of the project, including, but not limited to:
    - Changes in size or complexity.
    - Changes in project scope.
    - Changes in OWNER's schedule.
- Permitting assistance.

PART 4.0 OWNER'S RESPONSIBILITIES

OWNER will be responsible for the following activities:

- Provide available data.
- Timely review of deliverables including meeting minutes, TMs, and report. For schedule estimating purposes, it is assumed OWNER review time will be approximately two (2) weeks.
- Participation in meetings.

PART 5.0 PERIODS OF SERVICE

ENGINEER will commence work upon execution of this Task Order. The schedule for completion of the services included in this Task Order will be agreed upon by the OWNER and ENGINEER at the time that the OWNER is ready to proceed with the work. The anticipated schedule is as follows:

Task 100:	4 months
Task 200:	Months 4-10
Task 300:	Months 10-16
Task 400:	Months 0-16

PART 6.0 PAYMENTS TO ENGINEER

ENGINEER will be compensated for actual work performed on a Per Diem (time and expense) basis, in an amount not to exceed $1,229,500.00. Payment for fees will be paid monthly based on actual labor time and the hourly billing rates plus project related reimbursable expenses. Funds may be transferred from one task to another without amendment, as long as the total cost is not exceeded.

Task 100:	FRAMEWORK	$ 395,285.00
Task 200:	SOLUTION DEVELOPMENT AND EVALUATION	$ 338,854.00
Task 300:	IMPLEMENTATION	$313,546.00
Task 400:	PROJECT MANAGEMENT	$81,815.00
Task 500:	SUPPLEMENTAL DATA COLLECTION AND TESTING (ALLOWANCE)	$100,000.00
	TOTAL	$1,229,500.00

All Per Diem (hourly fee) work will be charged based upon the personnel classifications performing the work and corresponding hourly rate set forth in the attached hourly and fee breakdown incorporated herein as Attachment A. The Hourly Fee Summary is attached as Attachment B and incorporated herein by reference. Hourly rates are subject to review and adjustment annually. Any adjusted hourly rates shall be subject to mutual agreement by ENGINEER and OWNER.

TASK ORDER: 10021-01 – BIOSOLIDS MASTER PLAN

This Task Order is executed on _____.

OWNER:	ENGINEER:
UNION COUNTY, NC	BLACK & VEATCH INTERNATIONAL COMPANY
By:_____	By:_____
Name: _____	Name: _____
Title:_____	Title:_____
Address:_____	Address:_____

Approved as to Legal Form: BTI____

This instrument has been preaudited in the manner required by the Local Government Budget and Fiscal Control Act.

_____
Deputy Finance Officer

Attachment A: Billing Rate Schedule

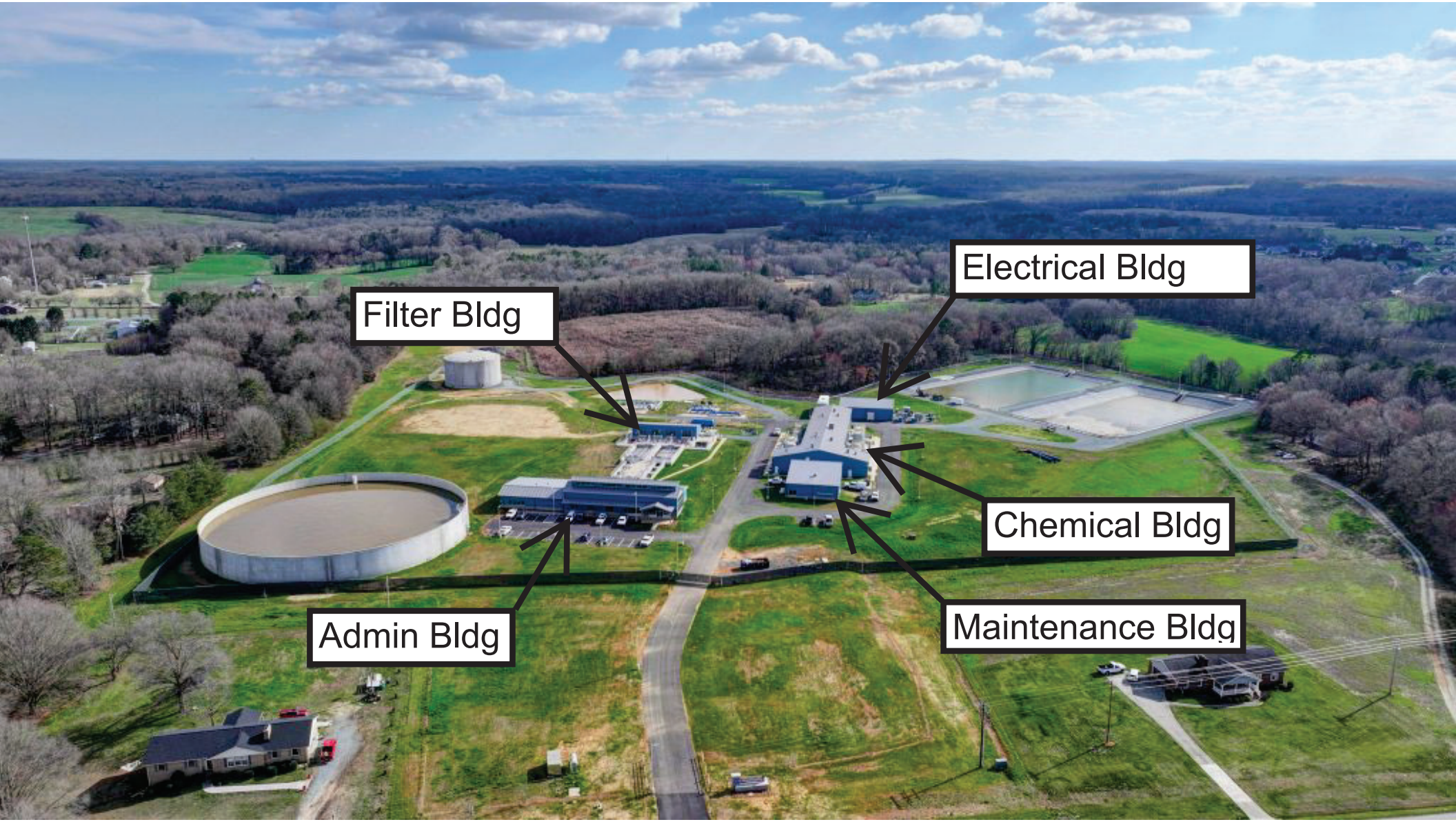
For the Scope of Services, OWNER will compensate ENGINEER in accordance with the Bill Rate Schedule below, plus Reimbursable Expenses in accordance with Section 6.1.5 of the Agreement. Standard hourly rates are subject to review and adjustment annually. Any adjusted hourly rates shall be subject to mutual agreement by ENGINEER and OWNER. Hourly rates effective on the date of this Agreement are as follows:

HOURLY RATE SCHEDULE Effective through December 31, 2026	
Principal/Sr. Project Director	$360
Discipline Director/Consulting Director	$350
Principal Engineering Manager	$350
Principal Discipline Engineer	$330
Sr. Project Manager	$310
Sr. Engineering Manager	$300
Sr Construction Manager	$295
Sr. Discipline Engineer	$295
Sr. Env Scientist/Sr Consultant	$295
Sr Estimator	$285
Sr. Architect	$280
Project Manager	$270
CAD/BIM Tech Director	$250
Engineering Manager	$250
Lead Env Scientist/Lead Consultant	$245
Lead Engineer	$225
CAD/BIM Tech Coordinator	$225
Sr Contracts Manager	$220
Lead Estimator	$215
Lead Architect	$210
Field Engineer/Construction Manager	$205
Sr Associate Engineer - Civil	$200
CAD/BIM Sr Technician	$195
Sr Project Controls	$195
Associate Consultant	$190
Associate Engineer - Disciplines	$190
Contract Support	$190
Lead Resident Inspector	$190
Associate Engineer - Civil	$185

Sr Project Admin	$180
CAD/BIM Lead Technician	$170
Graduate Engineer – Disciplines	$170
Graduate Engineer - Civil	$165
Lead Finance/Accountant/Biller	$160
Resident Inspector	$160
Project Controls	$150
CAD/BIM Associate Technician	$145
Sr Clerical	$145
Jr Graduate Engineer - Civil	$145
Project Admin	$140
Associate Finance/Accountant/Biller	$130
Engineering Intern	$130
Clerical	$120

Attachment B: Hourly Fee Summary

		Staffing Summary											Hours	Labor	Expenses & Allowances	Project Total
	Client Position	Director	Project Manager	Lead Finance/Accounting/Billing	Project Admin	Project Controls	Sr. Engineering Manager/QC	Associate Engineer - Civil/Mechanical	Principal Process Engineer	Sr. Process Engineer/QC	Associate Engineer - Process	Lead Estimator				
	HOURS\COST TOTALS IN USD $:	**68**	**276**	**20**	**56**	**20**	**603**	**553**	**687**	**354**	**1,604**	**111**	**4,352**			
	CONTRACT TOTALS IN USD $:													**$ 1,111,000**	**$ 118,500**	**$ 1,229,500**
Task	**Description**															
Task 1	**Framework**															
1/.01	Kickoff Meeting	4	4				4	6	18	2	18		**56**	**$ 15,509**		**$ 15,509**
1/.02	Data Collection and Review						22	33	36	4	89		**184**	**$ 44,982**		**$ 44,982**
1/.03	Operations Evaluations		9				64	64	20		40		**197**	**$ 50,390**		**$ 50,390**
1/.04	Regulatory and Policy Review	1	2				4		18	22	22		**69**	**$ 19,635**		**$ 19,635**
1/.05	Bisolids Production Forecast						4		9	4	18		**35**	**$ 9,209**		**$ 9,209**
1/.06	Existing System Assessment		13				18		27		89		**147**	**$ 36,467**		**$ 36,467**
1/.07	End Use Options/Market Assessment	2	2				6		31	89	178		**308**	**$ 77,012**		**$ 77,012**
1/.08	Framework Definition Workshop		6				9		36	18	44		**113**	**$ 31,364**		**$ 31,364**
1/.09	Framework Definition TM		9				33	44	36	49	89		**260**	**$ 67,132**		**$ 67,132**
1/.10	Assess Regional Opportunities	22	29				4		22	22	33		**132**	**$ 38,588**		**$ 38,588**
1/.11	Framework Misc. Expenses														**$ 5,000**	**$ 5,000**
	Task 1 Subtotals	**29**	**74**				**168**	**147**	**253**	**210**	**620**		**1,501**	**$ 390,285**	**$ 5,000**	**$ 395,285**
Task 2	**Solution Development and Evaluation**															
2/.01	Development of Screening and Evaluation Criteria		2						7	4	27		**40**	**$ 9,618**		**$ 9,618**
2/.02	Screening and Evaluation Criteria TM		2				2		7	2	33		**46**	**$ 10,826**		**$ 10,826**
2/.03	Technology Overview & Screening		2				9		56	27	111		**205**	**$ 53,314**		**$ 53,314**
2/.04	Technology Screening Workshop		6				9		18	9	18		**60**	**$ 17,152**		**$ 17,152**
2/.05	Alternatives Identification Workshop		9				9		18		44		**80**	**$ 20,402**		**$ 20,402**
2/.06	Alternatives Development and Evaluation	4	4				44	111	67	31	222		**483**	**$ 115,715**		**$ 115,715**
2/.07	Alternatives Evaluation Workshop		6				9		18	9	18		**60**	**$ 17,152**		**$ 17,152**
2/.08	Solution Development and Evaluation TM		13				33	56	44	31	89		**266**	**$ 67,856**		**$ 67,856**
2/.09	Solution Dev and Evaluation Misc. Expenses														**$ 6,000**	**$ 6,000**
2/.10	Technology Witness Trips						36	40					**76**	**$ 19,320**	**$ 1,500**	**$ 20,820**
	Task 2 Subtotals	**4**	**44**				**151**	**207**	**235**	**113**	**562**		**1,316**	**$ 331,354**	**$ 7,500**	**$ 338,854**
Task 3	**Implementation**															
3/.01	Strategy Development		13				33		44		67		**157**	**$ 42,693**		**$ 42,693**
3/.02	Strategy Development Workshop	3	6				9		9	2			**29**	**$ 9,377**		**$ 9,377**
3/.03	CIP Development	2	22				67	111	27		67		**296**	**$ 72,944**		**$ 72,944**
3/.04	CIP Cost Estimate		2				11		18		44	111	**186**	**$ 44,105**		**$ 44,105**
3/.05	CIP Project Prioritization & Scheduling	2	13				56	44	27		44		**186**	**$ 48,972**		**$ 48,972**
3/.06	CIP Schedule Validation Workshop	3	6				6		9	2			**26**	**$ 8,432**		**$ 8,432**
3/.07	Biosolids Master Plan Report		13				33	44	18	27	133		**268**	**$ 63,992**		**$ 63,992**
3/.08	Biosolids Master Plan Report Review Workshop	4	7				9		27		27		**74**	**$ 21,032**		**$ 21,032**
3/.09	Implementation Misc. Expenses														**$ 2,000**	**$ 2,000**
	Task 3 Subtotals	**14**	**82**				**224**	**199**	**179**	**31**	**382**	**111**	**1,222**	**$ 311,546**	**$ 2,000**	**$ 313,546**
Task 4	**PM&A**															
4/.01	General PM&A	10	56	20	56	20	20						**182**	**$ 40,593**		**$ 40,593**
4/.02	Progress Meetings	11	20				40		20		40		**131**	**$ 37,223**		**$ 37,223**
4/.03	PM&A Misc. Expenses														**$ 4,000**	**$ 4,000**
	Task 4 Subtotals	**21**	**76**	**20**	**56**	**20**	**60**		**20**		**40**		**313**	**$ 77,816**	**$ 4,000**	**$ 81,816**
Task 5	**Supplemental Data Collection and Testing (Allowance)**															
5/.01	Supplemental Data Collection and Testing Allowance														**$ 100,000**	**$ 100,000**
	Task 5 Subtotals														**$ 100,000**	**$ 100,000**


Filter Bldg
Electrical Bldg
Chemical Bldg
Admin Bldg
Maintenance Bldg

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-300 **Agenda Date:** 6/1/2026

TITLE:

Contract - Task Order Amendment to 12-Mile Site 5 Sub-Metering Task Order

INFORMATION CONTACT:

Christopher Clark, Union County Water, Director of Water and Wastewater Operations, 704-296-4215

ACTION REQUESTED:

Authorize the County Manager to 1) negotiate and execute an agreement with Gavel and Dorn Engineering, PLLC, substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Pursuant to past flow metering having been performed in the 12-Mile Creek drainage basin under a previous contract, this task order will further refine our evaluation of “Site 5” as it exhibited significant amounts of rainfall induced inflow and infiltration. Under the original Task Order, Gavel and Dorn Engineering, PLLC, installed seventeen (17) flow meters and two (2) rain gauges within the Site 5 basin along with two (2) flow meters and one (1) rain gauge in the Poplin Pump Station basin. Due to a lack of rain events resulting in an extended duration of flow monitoring, additional funding is needed to complete our study of this basin.

FINANCIAL IMPACT:

The cost for this amended task order is $188,750. Funding is available in the adopted FY2026 budget appropriation in budget code 60026510-5381.

TASK ORDER 9663-01 Amendment 01

This Task Order Amendment pertains to an Agreement by and between UNION COUNTY, NORTH CAROLINA ("OWNER" or "Owner"), and GAVEL & DORN ENGINEERING, PLLC ("ENGINEER" or G&D), dated June 13, 2025 ("the Agreement"), as modified by Task Order 9663-01 dated October 20, 2025. ENGINEER shall perform services on the project described below as provided herein and in the Agreement and the Task Order. This Task Order Amendment shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order Amendment shall supplement the Agreement and the Task Order as it pertains to the project described below.

TASK ORDER NUMBER: 9663-01 Amendment 01

PROJECT NAME: 12-Mile Site 5 Sub-Metering

The parties agree to amend Task Order 9663-01 as specified below.

1. Modify **PART 5.0, PERIODS OF SERVICE,** to extend the period of fieldwork from "110 days from the start date (NTP) unless extended by OWNER" to "170 days from the start date (NTP) unless extended by OWNER."

2. Modify **PART 6.0 PAYMENTS TO ENGINEER**, by replacing the fee table in the Task Order with the following:

12-Mile Site 5 Sub-Metering – Fee Table				
Item	**Unit**	**Quantity**	**Unit Cost**	**Extended Cost**
Flow Meter Installation	EA	19	$600	$11,400
Meter Maintenance	Meter/Month	95	$1,450	$137,750
Rain Gauge	Gauge/Month	15	$740	$11,100
Data Analysis	Meter/Month	95	$300	$28,500
			Total	$188,750

This Task Order is executed this _____.

UNION COUNTY, NORTH CAROLINA	GAVEL & DORN ENGINEERING, PLLC
"OWNER"	"ENGINEER"
BY: _____	BY: _____
NAME: Brian Matthews	NAME: Jason Dorn
TITLE: County Manager	TITLE: President
ADDRESS: 500 N. Main Street Monroe, NC 28112	ADDRESS: 6730 Freedom Drive Charlotte, NC 28214

Approved as to Legal Form: BTI

This instrument has been preaudited in the manner required by the Local Government Budget and Fiscal Control Act.

_____
Deputy Finance Officer

Docusign Envelope ID: EC12CF77-1F35-4032-A61D-6E1A5DB47154

APPENDIX

Exhibit A

TASK ORDER 9663-01

This Task Order pertains to an Agreement by and between UNION COUNTY, NORTH CAROLINA ("OWNER"*), and GAVEL & DORN ENGINEERING, PLLC ("ENGINEER"**), dated June 13th, 2025 ("the Agreement"). ENGINEER shall perform services on the project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order shall supplement the Agreement as it pertains to the project described below.

Int DS JD Initial BWM

* or "Owner"
**or "G&D"

TASK ORDER NUMBER: **9663-01**

PROJECT NAME: 12-Mile Site 5 Sub-Metering

PART 1.0 PROJECT DESCRIPTION:

Flow metering was performed in the **12-Mile Creek** drainage basin under the previous contract. The results of that study indicate that "**Site 5**" exhibited significant amounts of rainfall induced inflow and infiltration (RDII). Under this Task Order, the collection system upstream of Site 5 will be sub-metered. G&D will install seventeen (17) meters and two (2) rain gauges within the Site 5 basin. Additionally, two (2) meters and one (1) rain gauge will be installed in the Poplin pumpstation basin, as it pumps flow into the Site 5 basin. The metering equipment will be installed for a period of three (3) months. The collected data will be analyzed for metrics associated with both dry and wet weather flows for comparison. These results will direct further SSES activities (e.g., MH inspections and smoke testing).

PART 2.0 SCOPE OF BASIC SERVICES TO BE PERFORMED BY ENGINEER ON THE PROJECT:

A. The initial step in the project will include a Project Kick-off Meeting, during which the goals and objectives of the project will be reviewed, data requirements discussed, communication plans developed, and the preliminary work plan reviewed and modified as needed.

B. The most current versions of the GIS files for the 12 Mile Basin area shall be obtained from the Owner. Based on the mapping and areas provided by the Owner, the ENGINEER will confirm the viability of these locations. Meters will be placed at key locations throughout the system to isolate flow into smaller basins. Locations will be reviewed with and approved by the Owner prior to being deployed.

C. A total of nineteen (19) temporary flow meter units will be installed in manholes at the approved locations in accordance with manufacturer recommendations. These units will remain in service for 3 months or until sufficient rain events are captured to evaluate the I-I entering the system. Hach FL900 series flow monitors with

Docusign Envelope ID: EC12CF77-1F35-4032-A61D-6E1A5DB47154

submerged level-velocity sensors will be utilized. Level-velocity meters operate using a single sensor that translates pressure into depth of flow and uses Doppler to measure average velocity. The meters will continuously monitor the level and velocity within the pipe and calculate the corresponding rate of flow; a data point for level, flow, and velocity will be stored every five (5) minutes.

Three (3) tipping bucket rain gauges will be deployed within the drainage area. Rainfall data will be collected at the same time interval (5-min) as the flow metering data.

D. The flow meters will continuously submit real-time data via a wireless cellular modem to a dedicated server where it can be viewed and downloaded through an internet-connected web browser. The data is also stored on the meter and can be manually downloaded during a site visit if the cellular signal is not sufficient to upload data. The system will also include alarms to submit event notifications via SMS texts and emails in the event any problems occur with the meters. ~~Union~~ Owner ~~Water~~ staff will be provided with a username and password to view the data in near real time.

Initial DS BWM

E. A confined space entry-certified crew will assess the suitability of the proposed meter sites, install the meters, calibrate them to match the existing conditions encountered in the field, perform any necessary site visits for equipment replacement and maintenance, and remove the meters at the end of the monitoring period. Data specialists will daily monitor meter operation and data remotely via the Claros web portal. Any equipment malfunctions, sensor fouling, or other problems will be immediately apparent from the data. Field crews will be dispatched as soon as possible to troubleshoot and resolve the problems.

F. The flow and rainfall data will be reviewed, processed, reconstructed (as needed), and analyzed. Wet weather flows will be compared to dry weather flows to quantify the amount of extraneous flow entering the system upstream of each meter. This flow will be disaggregated into rainfall induced infiltration and inflow (i.e., RDII) based on the characteristics of the data.

G. A draft Final Report will be prepared which will summarize findings, estimate RDII per meter basin, rank the meter basins according to RDII severity, and recommend additional field evaluation activities to identify the exact sources of the RDII within the system. Once the Owner has reviewed the draft Final Report and provided comments, a Final Report will be submitted.

H. A brief weekly progress report will be submitted to the Owner that summarizes the work completed that week and identifies any work that will be occurring in the following week. It will also identify any issues that have occurred during work and request any additional information that might be needed from the Owner. A monthly progress meeting (either in person or via web conference) will be held to discuss the project in detail.

Docusign Envelope ID: EC12CF77-1F35-4032-A61D-6E1A5DB47154

PART 3.0 ADDITIONAL SERVICES, NOT PART OF BASIC SERVICES:

A. Study of any sewer basins outside of the gravity sewer area known as 12 Mile Site 5 Basin.

B. Performance of any field assessment activities beyond those specifically mentioned in this scope of work.

C. Design of any sewer rehabilitation, repair or replacement work to address deficiencies in the sewer collection system.

D. Permitting or other regulatory agency compliance activities.

PART 4.0 OWNER'S RESPONSIBILITIES:

A. Provide ENGINEER with electronic data including GIS files, previous reports or studies, or other relevant data.* *which is in OWNER's possession Int DS SD Initial BWM

B. Assist ENGINEER with any public issues or concerns.

C. ~~Promptly review~~ ** and advise ENGINEER of any recommended changes to the project or concerns with the scope or schedule of the work and provide review comments for the Draft Flow meter analysis and I/I report. ** Review Int DS SD Initial BWM

PART 5.0 PERIODS OF SERVICE:

Work on the project will begin within 15 days of receipt of a written Notice to Proceed from OWNER. Fieldwork will be completed within 110 days from the start date (NTP) unless extended by OWNER. The draft I/I report will be submitted to OWNER within 60 days of completion of field assessment activities, and the Final I/I report will be submitted within 15 days of receipt of comments on the draft report from OWNER.

Docusign Envelope ID: EC12CF77-1F35-4032-A61D-6E1A5DB47154

PART 6.0 PAYMENTS TO ENGINEER:

1. Payment for Basic Services:

   All work included in the Basic Services Scope of Work will be completed per the following fee schedule:

12-Mile Site 5 Sub-Metering – Fee Table				
Item	**Unit**	**Quantity**	**Unit Cost**	**Extended Cost**
Flow Meter Installation	EA	19	$600.00	$11,400.00
Meter Maintenance	Meter/Month	57	$1,450.00	$82,650.00
Rain Gauge	Gauge/Month	9	$740.00	$6,660.00
Data Analysis	Meter/Month	57	$300.00	$17,100.00
			Total:	$117,810.00

2. Payment for Additional Services:

   Payment for Additional Services outside of the Basic Services Scope of Work shall be based upon a mutually agreed upon fee using a firmly defined scope of services. No work outside of the Basic Services will be performed without written amendment to this Task Order.

This Task Order is executed this October 20, 2025.

UNION COUNTY,
NORTH CAROLINA

By: Signed by: Brian W Matthews B14014C7F9F4414...

Name: Brian Matthews

Title: County Manager

Address: 500 N. Main St.
Monroe, NC 28112

GAVEL & DORN ENGINEERING, PLLC

By: Jason Dorn

Name: Jason Dorn

Title: Partner

Address: 6730 Freedom Drive
Charlotte, North Carolina 28214

Approved as to Legal Form: BTI

This instrument has been preaudited in the Manner required by The Local Government Budget and Fiscal Control Act.

Signed by: Kiara McClendon 8FAE3AF62783473...

Deputy Finance Officer

File #: 26-304 **Agenda Date:** 6/1/2026

TITLE:

Resolution for Dedication of a General Public Utility Easement for the City of Monroe on Union County Property

INFORMATION CONTACT:

John Shutak, Union County Water, Engineering Director, 704-283-3651

ACTION REQUESTED:

Adopt resolution dedicating a general public utility easement on the property of Union County for the benefit of the City of Monroe.

PRIOR BOARD ACTIONS:

1) November 18, 2019, Regular Meeting, Agenda Item #5 - Approved WK Dickson & Co., Inc. Task Order 2017-09 for engineering design services.
2) May 05, 2021, Regular Meeting, Agenda Item #10 - Approved WK Dickson & Co., Inc. Task Order 2017-09 Amendment 01 for engineering design services.
3) August 01, 2022, Regular Meeting, Agenda Item #22-491 - Approved WK Dickson & Co., Inc. Task Order 2017-09 Amendment 03 for engineering design services.
4) October 16, 2023, Regular Meeting, Agenda Item #23-707 - Approved RH Price, Inc. bid award, approved WK Dickson & Co., Inc. Task Order 2021-11 for construction services, and approved Capital Project Ordinance No. 360 for construction funding.

BACKGROUND:

The City of Monroe requests that Union County adopt a resolution for dedication of a general public utility easement for the maintenance of the newly installed Piedmont Innovation Park gravity sewer.

FINANCIAL IMPACT:

None.

RESOLUTION FOR DEDICATION OF A GENERAL PUBLIC UTILITY EASEMENT FOR THE CITY OF MONROE ON UNION COUNTY PROPERTY

WHEREAS, Union County currently owns certain properties along or near Goldmine Road and Price Short Cut Road in Union County, which properties are part of its Piedmont Innovation Park and may be more particularly referenced as Union County Tax Parcels #09372003D, #09372003E and #09372003G (collectively the "Properties"); and

WHEREAS, as part of Union County's development of its Piedmont Innovation Park, Union County extended a sewer line near and on the Properties (the "Sewer Line"); and

WHEREAS, the City of Monroe is now accepting ownership and maintenance of the Sewer Line, and as part of such process is requiring the dedication of a general public utility easement for operation of the sewer line, as such easement is shown on the Properties in the attached Exhibit 1 (the "Easement"); and

WHEREAS, dedication of the Easement will benefit the Properties, as well as benefit the City of Monroe; and

WHEREAS, North Carolina General Statutes §§ 153A-176, 160A-273, and 160A-274, as well as all other applicable law, permit the Union County Board of Commissioners to dedicate the Easement to the City of Monroe, with or without consideration, upon such conditions it deems wise; and

WHEREAS, the Board of Commissioners believes it wise to dedicate the Easement without monetary consideration, pursuant to applicable law.

NOW, THEREFORE, the Union County Board of Commissioners resolves as follows:

1. The Board of Commissioners hereby authorizes the County Manager to dedicate the Easement, as shown on the attached Exhibit 1, without monetary consideration.

2. The County Manager, or his designee, is authorized to execute any and all documents necessary to dedicate the Easement.

Adopted this the ____ day of _____, 2026.

ATTEST:

_____ _____

Lynn G. West, Clerk to the Board

Brian Helms, Chair
Union County Board of Commissioners

Exhibit 1

NORTH CAROLINA
_UNION__COUNTY

Excise Tax: **no excise tax**
Tax Parcel. No.: **09372003D, 09372003E and 09372003G**

GENERAL PUBLIC UTILITY EASEMENT

KNOW ALL MEN BY THESE PRESENTS, that **Union County, NC**, Grantor, in consideration of **$ 0 . 0 0** paid by the City of Monroe to Union County, NC, and in further consideration of benefits accruing to Union County, NC, and its successors in title, receipt whereof is hereby acknowledged, do hereby grant and convey to the City of Monroe, a North Carolina Municipal Corporation, Grantee, and its successors and assigns the perpetual right, privilege and easement to go in and upon its property, as described in deed duly recorded in the Office of the Register of Deeds for **Union** County in Book **7331**, at page **503 thru 516**, to which reference is hereby made for a more particular description (the "Property"), as such easement is further described in this instrument.

The specific location and dimensions of the permanent easement and any temporary easement are found on **EXHIBIT A** attached hereto and to which reference is made for a more particular description (the "Easement Area").

Grantee's right to enter Grantor's land for the purposes set forth in this General Public Utility Easement document shall be confined to streets, roads and driveways when they exist at the time entry is necessary and when they are adequate for Grantee's purposes, but when they do not exist or are not adequate, such right to enter shall be over the nearest most practical route or routes to the Easement Area.

The right and privilege and easement shall include construction, maintenance and operation in, upon, across and through the Easement Area in a proper manner all general public utilities (water, sewer, electric, telecommunication, and/or gas), together with the right to install taps and appliances with right at all times to enter upon said Easement Area for the purpose of inspecting said lines and to make necessary repairs, improvements and alterations thereupon. The following rights are also being granted:

a. To remove from the Easement Area, now or at any time in the future, trees, structures, or other obstructions that may interfere with the proper maintenance and operation of said easement.

b. To regulate, restrict, or prohibit any future building, fence, or other type temporary or permanent structure within the Easement Area.

c. To regulate, restrict, or prohibit any future placement of trees, shrubbery, or bushes within the Easement Area.

d. To regulate, restrict, or prohibit any changes of grade within the Easement Area.

Notwithstanding the foregoing, an approximately 60.97 acre portion of the Property, identified as a portion of PID 09372003D (the "Parcel D Portion") is currently under contract by Grantor to be sold to an entity which intends to develop it for industrial purposes, which will require relocation of the current sewer line crossing the Parcel D Portion depicted on Sheets 4 and 5 of Exhibit A attached hereto. Grantor and its successors and assigns reserve the right to relocate such sewer line to accommodate such development in accordance with all applicable law and utility rules and regulations and subject to review and approval by Grantee, which approval shall not be unreasonably withheld, in which case the Easement Area shown within the Parcel D Portion shall be automatically relocated to such new location within the Parcel D Portion upon the recording of a map showing the new location and the Easement Area described herein as it relates to such Parcel D Portion shall be deemed abandoned. Such sewer line relocation shall not affect the sewer line or Easement Area as otherwise set forth in the Property (outside of the Parcel D Portion) without consent of the Grantor or its successors and assigns pertaining to the relevant portions of the Property.

To have and to hold said right and easement to it the said Grantee and its successors in title forever.

IN TESTIMONY WHEREOF, the party(ies) of the first part, Grantor's authorized representative has hereunto set his/her hand and seal on the _____day of _____, 20_____.

_____(SEAL)

_____(SEAL)

_____(SEAL)

_____(SEAL)

NORTH CAROLINA - _____COUNTY

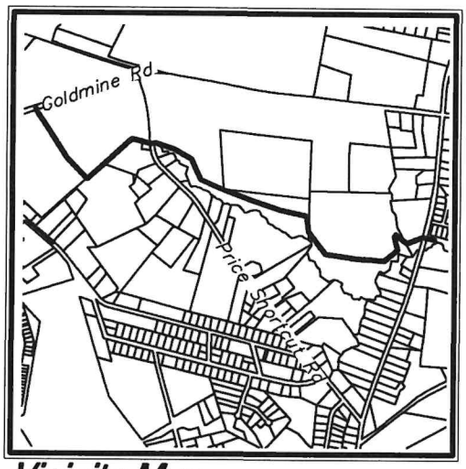
I, _____, a Notary Public in and for said County and State do hereby certify that _____personally appeared before me this day and being duly sworn stated that in his presence _____ _____acknowledged the due execution of the foregoing instrument for the purpose and intents therein expressed.

Witness my hand and Official Seal, this the _____day of _____, 20____.

My commission expires:_____ _____(SEAL)
Notary Public

EXHIBIT A

09



Vicinity Map

Legend	
Telephone Line ..	T
Power Line.....	OE
Power pole.....	PP
Sewer Clean out	CO
Sanitary Sewer Manhole	S
Guy Wire	
Light pole.....	LP
Fire hydrant.....	FH
Water meter.....	WM
Electric meter.....	EM
Water valve.....	WV
Flood Zone.....	
Public Drainage Esmt.	PDE
Iron Pin Found	IPF
Iron Pin Set	IPS
Computed Point	CP
Right of Way	

Certificate of Survey and Accuracy
State of North Carolina, Union County

I, William M. Lawrence, certify that this map was drawn under my supervision from a survey made under my supervision ;(Deed Description recorded in references as shown hereon); that the boundaries not surveyed are clearly indicted as drawn from information as shown hereon; that the positional accuracy does not exceeded 0.10' at the 95% confidence level; this map was prepared in accordance with G.S. 47-30(m) as amended; and that the survey is of another category, such as the recombination of existing s, a court-ordered survey, or other exemption or exception to the definition of subdivision.
Witness my hand and seal this Wednesday, April 15, 2026

William M. Lawrence, NCRLS L-5393

NORTH CAROLINA PROFESSIONAL SEAL L-5393 LAND SURVEYOR WILLIAM M. LAWRENCE

AREA TABLE: PID 09372003F	
±1,586,417 SF	TOTAL PARCEL
55,067 SF.	SEWER EASEMENT
±1,531,350 SF	TOTAL PARCEL REMAINING

AREA TABLE: PID 09372003E	
±3,371,172 SF	TOTAL PARCEL
81,049 SF.	SEWER EASEMENT
±3,290,123 SF	TOTAL PARCEL REMAINING

PID: 09372003F
Union County Board of Education
C/O Director of Facilities
DB. 9050, PG. 415

PID: 09372014B
Matthew K Ross
Sarah S Ross
DB. 7579, PG. 428

PID: 09372051
Matthew K Ross
Sarah S Ross
DB. 7579, PG. 428

PID: 09372003E
Union County
DB. 7331, PG. 506

E9 E10 E11 E12 E26 E27 E28 E29

Parcel Line Table		
Line #	Length	Direction
E9	384.77	S37° 36' 14.13"E
E10	228.16	S6° 44' 38.94"E
E11	408.37	S77° 33' 00.72"E
E12	382.31	S71° 05' 22.80"E
E26	384.47	S71° 05' 22.80"E
E27	388.74	S77° 33' 00.72"E
E28	215.11	S6° 44' 38.94"E
E29	405.22	S37° 36' 14.13"E

NC Grid
(NAD 83-CORS)

State Plane Coordinate values were obtained using a Topcon Hiper GPS using Virtual Reference Stations

Flood Certification
I have examined the Flood Insurance Rate Map for Union County North Carolina, Community Panel Number 3710541500J, dated October 16, 2008, and hereby certify that this property is located in a special flood hazard area as determined by the Federal Emergency Management Agency.

Note:
1. Property Owners information is taken from current deeds and tax records and are considered "now or formerly".
2. May be subject to other right of ways, easements or restrictions either recorded or implied.
3. This survey was performed without benefit of a title commitment report. Lawrence Associates does not claim that all matters of record which may or may not affect the subject property are shown hereon.

-150 0 75 150

(IN FEET)
1 inch = 150 ft.

Sheet 1 of 5

LAWRENCE ASSOCIATES
115 N Church St
Monroe, North Carolina 28112
P 704-289-1013
F 704-283-9035
www.lawrencesurveying.com
Firm License Number: C-2856

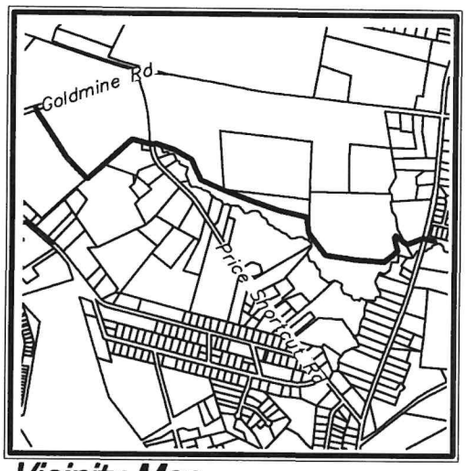
Easement Plat for
Piedmont Innovations
City of Monroe, Union County, NC

REVISIONS
TLE 1-9-26
TLE 3-17-26

Orig. scale: 1" = 150' *Date: August 20, 2025* *Drawn By: TLE*

Job No. 6997 **Drawing file: Easement Plat.dwg** **Drawing no. 25/54**

CADL:\6997 Price (Piedmont Inn.)\6997 Price Easement Plats Final 04-15-26.dwg 4/15/2026 by: Taylor Estep



Vicinity Map

NORTH CAROLINA PROFESSIONAL SEAL L-5393 LAND SURVEYOR WILLIAM M. LAWRENCE

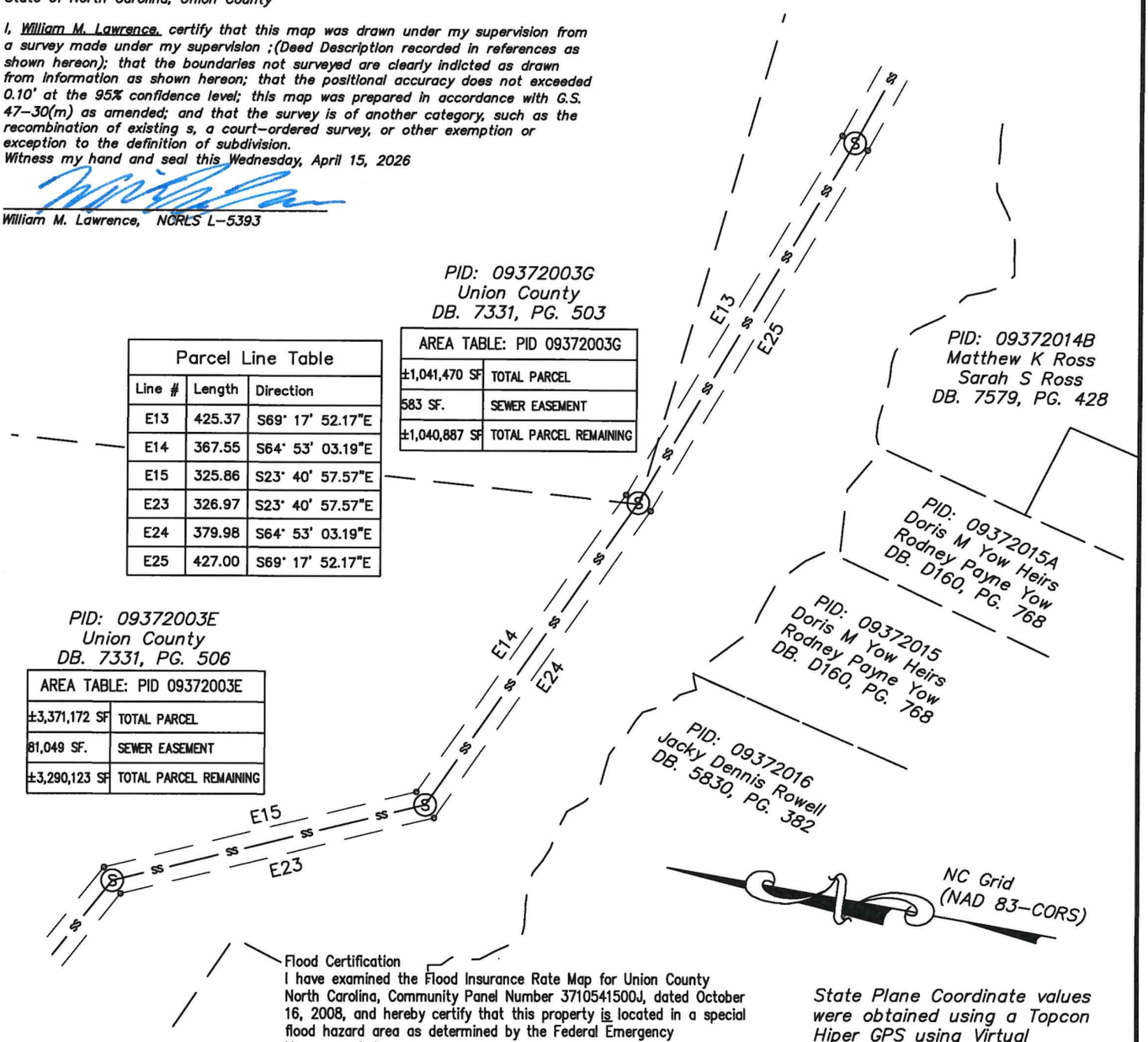
Legend

Telephone Line ..	T
Power Line.....	OE
Power pole.....	PP
Sewer Clean out	CO
Sanitary Sewer Manhole	S
Guy Wire	
Light pole.....	LP
Fire hydrant.....	FH
Water meter.....	WM
Electric meter.....	EM
Water valve.....	WV
Flood Zone.....	
Public Drainage Esmt.	PDE
Iron Pin Found	IPF
Iron Pin Set	IPS
Computed Point	CP
Right of Way	

Certificate of Survey and Accuracy
State of North Carolina, Union County

I, William M. Lawrence, certify that this map was drawn under my supervision from a survey made under my supervision ;(Deed Description recorded in references as shown hereon); that the boundaries not surveyed are clearly indicted as drawn from information as shown hereon; that the positional accuracy does not exceeded 0.10' at the 95% confidence level; this map was prepared in accordance with G.S. 47-30(m) as amended; and that the survey is of another category, such as the recombination of existing s, a court-ordered survey, or other exemption or exception to the definition of subdivision.
Witness my hand and seal this Wednesday, April 15, 2026

William M. Lawrence, NCRLS L-5393



Parcel Line Table		
Line #	Length	Direction
E13	425.37	S69° 17' 52.17"E
E14	367.55	S64° 53' 03.19"E
E15	325.86	S23° 40' 57.57"E
E23	326.97	S23° 40' 57.57"E
E24	379.98	S64° 53' 03.19"E
E25	427.00	S69° 17' 52.17"E

AREA TABLE: PID 09372003G	
±1,041,470 SF	TOTAL PARCEL
583 SF.	SEWER EASEMENT
±1,040,887 SF	TOTAL PARCEL REMAINING

AREA TABLE: PID 09372003E	
±3,371,172 SF	TOTAL PARCEL
81,049 SF.	SEWER EASEMENT
±3,290,123 SF	TOTAL PARCEL REMAINING

NC Grid
(NAD 83-CORS)

Flood Certification
I have examined the Flood Insurance Rate Map for Union County North Carolina, Community Panel Number 3710541500J, dated October 16, 2008, and hereby certify that this property is located in a special flood hazard area as determined by the Federal Emergency Management Agency.

State Plane Coordinate values were obtained using a Topcon Hiper GPS using Virtual Reference Stations

Note:
1. Property Owners information is taken from current deeds and tax records and are considered "now or formerly".
2. May be subject to other right of ways, easements or restrictions either recorded or implied.
3. This survey was performed without benefit of a title commitment report. Lawrence Associates does not claim that all matters of record which may or may not affect the subject property are shown hereon.

-150 0 75 150

(IN FEET)
1 inch = 150 ft.

Sheet 2 of 5

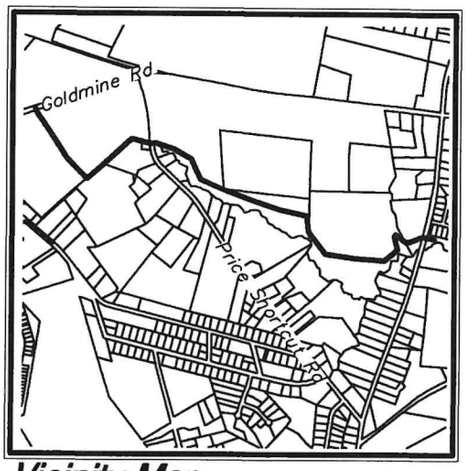
LAWRENCE ASSOCIATES
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Firm License Number: C-2856

Easement Plat for
Piedmont Innovations
City of Monroe, Union County, NC

REVISIONS
TLE 1-9-26
TLE 3-17-26

Orig. scale: 1" = 150' Date: August 20, 2025 Drawn By: TLE

Job No. 6997 Drawing file: Easement Plat.dwg Drawing no. 25/54



Vicinity Map

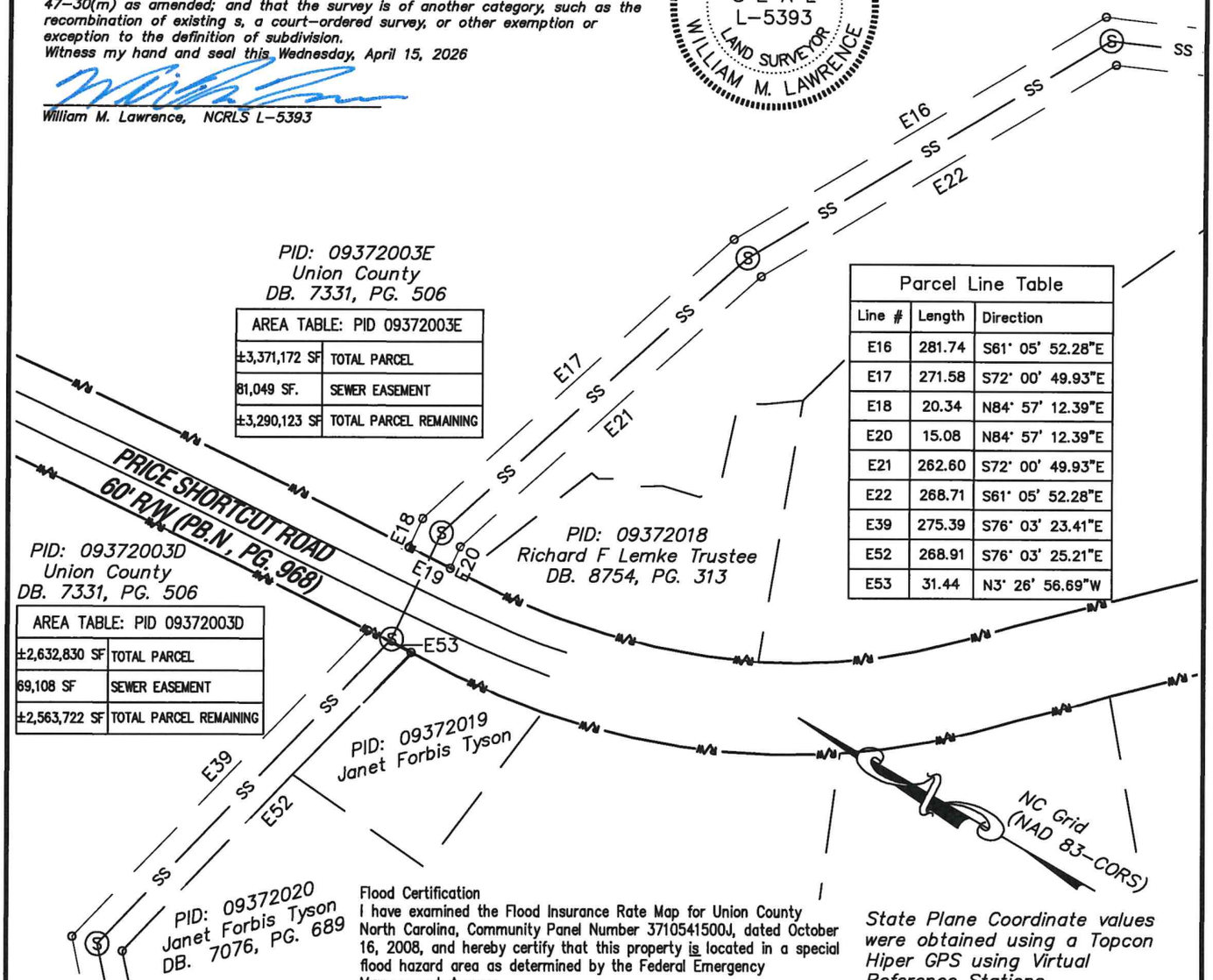
Legend	
Telephone Line ..	T
Power Line.....	OE
Power pole.....	PP
Sewer Clean out	CO
Sanitary Sewer Manhole	S
Guy Wire	
Light pole.....	LP
Fire hydrant.....	FH
Water meter.....	WM
Electric meter.....	EM
Water valve.....	WV
Flood Zone.....	
Public Drainage Esmt.	PDE
Iron Pin Found	IPF
Iron Pin Set	IPS
Computed Point	CP
Right of Way	

Certificate of Survey and Accuracy
State of North Carolina, Union County

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Witness my hand and seal this Wednesday, April 15, 2026

William M. Lawrence, NCRLS L-5393

NORTH CAROLINA PROFESSIONAL SEAL L-5393 LAND SURVEYOR WILLIAM M. LAWRENCE



AREA TABLE: PID 09372003E	
±3,371,172 SF	TOTAL PARCEL
81,049 SF.	SEWER EASEMENT
±3,290,123 SF	TOTAL PARCEL REMAINING

AREA TABLE: PID 09372003D	
±2,632,830 SF	TOTAL PARCEL
69,108 SF	SEWER EASEMENT
±2,563,722 SF	TOTAL PARCEL REMAINING

Parcel Line Table		
Line #	Length	Direction
E16	281.74	S61° 05' 52.28"E
E17	271.58	S72° 00' 49.93"E
E18	20.34	N84° 57' 12.39"E
E20	15.08	N84° 57' 12.39"E
E21	262.60	S72° 00' 49.93"E
E22	268.71	S61° 05' 52.28"E
E39	275.39	S76° 03' 23.41"E
E52	268.91	S76° 03' 25.21"E
E53	31.44	N3° 26' 56.69"W

Flood Certification
I have examined the Flood Insurance Rate Map for Union County North Carolina, Community Panel Number 3710541500J, dated October 16, 2008, and hereby certify that this property is located in a special flood hazard area as determined by the Federal Emergency Management Agency.

State Plane Coordinate values were obtained using a Topcon Hiper GPS using Virtual Reference Stations

Note:
1. Property Owners information is taken from current deeds and tax records and are considered "now or formerly".
2. May be subject to other right of ways, easements or restrictions either recorded or implied.
3. This survey was performed without benefit of a title commitment report. Lawrence Associates does not claim that all matters of record which may or may not affect the subject property are shown hereon.

-100 0 50 100

(IN FEET)
1 inch = 100 ft.

Sheet 3 of 5

LAWRENCE ASSOCIATES
115 N Church St
Monroe, North Carolina 28112
P 704-289-1013
F 704-283-9035
www.lawrencesurveying.com
Firm License Number: C-2856

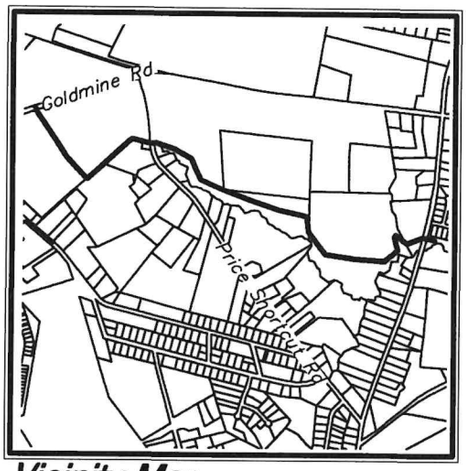
Easement Plat for
Piedmont Innovations
City of Monroe, Union County, NC

REVISIONS
TLE 1-9-26
TLE 3-17-26

Orig. scale: 1" = 100' *Date: August 20, 2025* *Drawn By: TLE*

Job No. 6997 **Drawing file: Easement Plat.dwg** **Drawing no. 25/54**

CADL:\6997 Price (Piedmont Inn.)\6997 Price Easement Plats Final 04-15-26.dwg 4/15/2026 by: Taylor Estep



Vicinity Map

Certificate of Survey and Accuracy
State of North Carolina, Union County

I, William M. Lawrence, certify that this map was drawn under my supervision from a survey made under my supervision ;(Deed Description recorded in references as shown hereon); that the boundaries not surveyed are clearly indicted as drawn from information as shown hereon; that the positional accuracy does not exceeded 0.10' at the 95% confidence level; this map was prepared in accordance with G.S. 47-30(m) as amended; and that the survey is of another category, such as the recombination of existing s, a court-ordered survey, or other exemption or exception to the definition of subdivision.
Witness my hand and seal this Wednesday, April 15, 2026

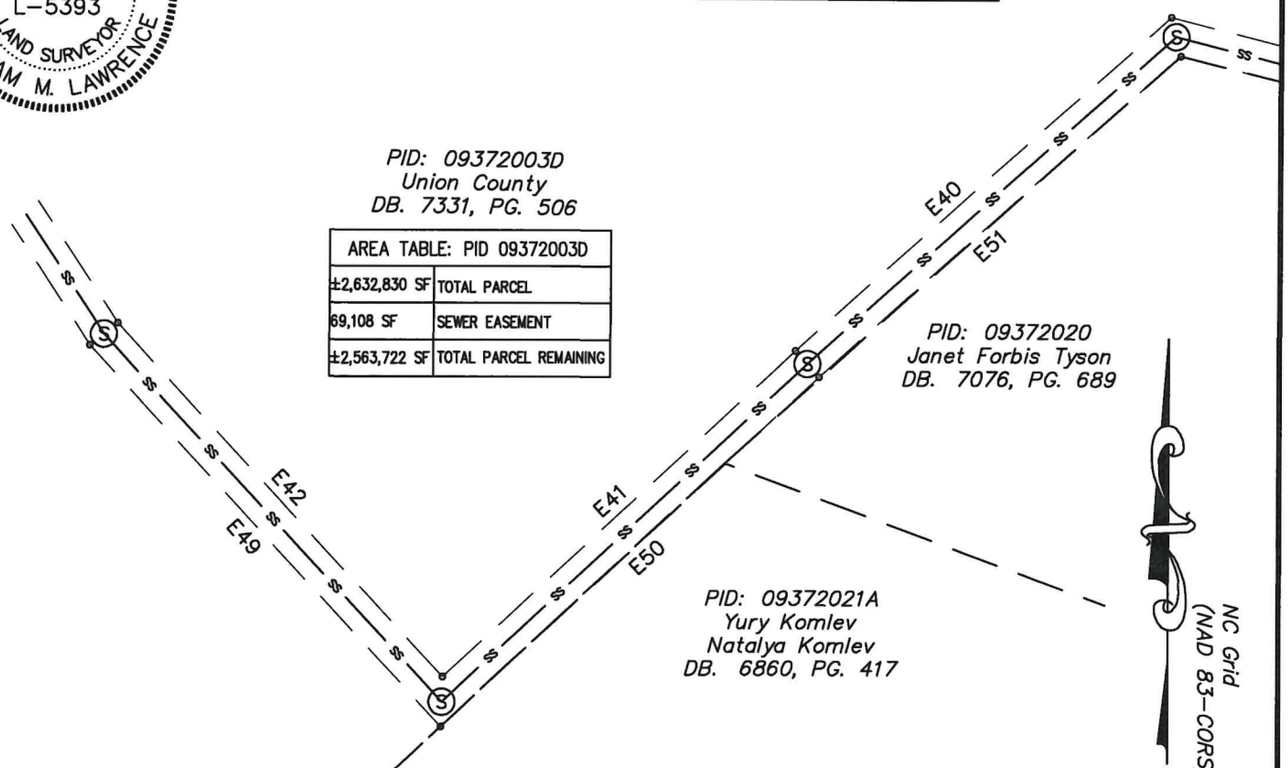
William M. Lawrence, NCRLS L-5393

NORTH CAROLINA PROFESSIONAL SEAL L-5393 LAND SURVEYOR WILLIAM M. LAWRENCE

Legend

Telephone Line ..	T
Power Line.....	OE
Power pole.....	PP
Sewer Clean out	CO
Sanitary Sewer Manhole	S
Guy Wire	
Light pole.....	LP
Fire hydrant.....	FH
Water meter.....	WM
Electric meter.....	EM
Water valve.....	WV
Flood Zone.....	
Public Drainage Esmt.	PDE
Iron Pin Found	IPF
Iron Pin Set	IPS
Computed Point	CP
Right of Way	

Parcel Line Table		
Line #	Length	Direction
E40	429.18	N48° 08' 10.93"E
E41	410.34	N47° 10' 56.27"E
E42	409.82	S42° 51' 52.13"E
E49	442.24	S42° 51' 52.13"E
E50	440.07	N47° 10' 56.27"E
E51	413.05	N48° 08' 10.93"E



AREA TABLE: PID 09372003D	
±2,632,830 SF	TOTAL PARCEL
69,108 SF	SEWER EASEMENT
±2,563,722 SF	TOTAL PARCEL REMAINING

Flood Certification
I have examined the Flood Insurance Rate Map for Union County North Carolina, Community Panel Number 3710541500J, dated October 16, 2008, and hereby certify that this property is located in a special flood hazard area as determined by the Federal Emergency Management Agency.

State Plane Coordinate values were obtained using a Topcon Hiper GPS using Virtual Reference Stations

Note:
1. Property Owners information is taken from current deeds and tax records and are considered "now or formerly".
2. May be subject to other right of ways, easements or restrictions either recorded or implied.
3. This survey was performed without benefit of a title commitment report. Lawrence Associates does not claim that all matters of record which may or may not affect the subject property are shown hereon.

-150 0 75 150

(IN FEET)
1 inch = 150 ft.

Sheet 4 of 5

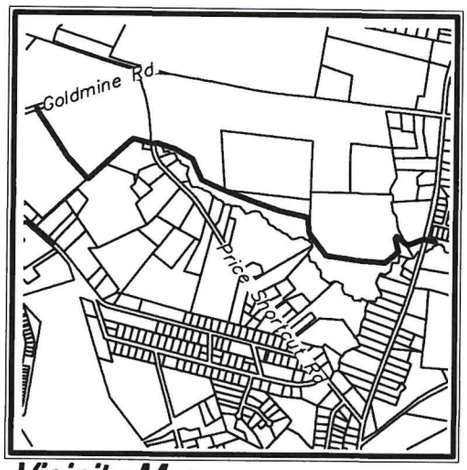
LAWRENCE ASSOCIATES
115 N Church St
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F 704-283-9035
www.lawrencesurveying.com
Firm License Number: C-2856

Easement Plat for
Piedmont Innovations
City of Monroe, Union County, NC

REVISIONS
TLE 1-9-26
TLE 3-17-26

Orig. scale: 1" = 150' *Date: August 20, 2025* *Drawn By: TLE*

Job No. 6997 **Drawing file: Easement Plat.dwg** **Drawing no. 25/54**



Vicinity Map

Certificate of Survey and Accuracy
State of North Carolina, Union County

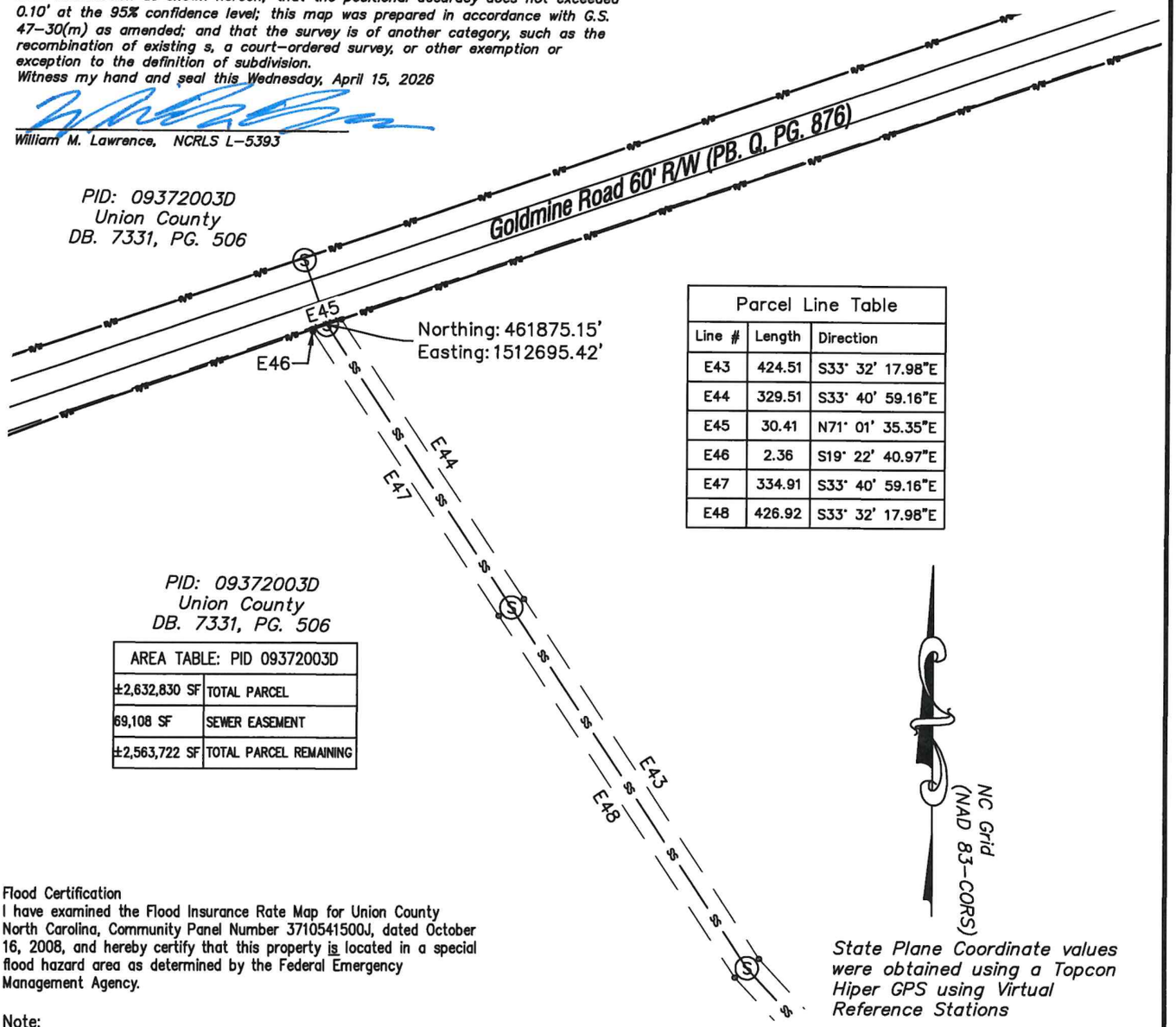
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Witness my hand and seal this Wednesday, April 15, 2026

William M. Lawrence, NCRLS L-5393

NORTH CAROLINA PROFESSIONAL SEAL L-5393 LAND SURVEYOR WILLIAM M. LAWRENCE

Legend

Telephone Line ..	T
Power Line.....	OE
Power pole.....	PP
Sewer Clean out	CO
Sanitary Sewer Manhole	S
Guy Wire	
Light pole.....	LP
Fire hydrant.....	FH
Water meter.....	WM
Electric meter.....	EM
Water valve.....	WV
Flood Zone.....	
Public Drainage Esmt.	PDE
Iron Pin Found	IPF
Iron Pin Set	IPS
Computed Point	CP
Right of Way	



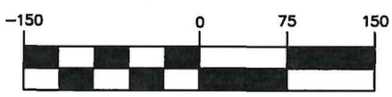
Parcel Line Table		
Line #	Length	Direction
E43	424.51	S33° 32' 17.98"E
E44	329.51	S33° 40' 59.16"E
E45	30.41	N71° 01' 35.35"E
E46	2.36	S19° 22' 40.97"E
E47	334.91	S33° 40' 59.16"E
E48	426.92	S33° 32' 17.98"E

AREA TABLE: PID 09372003D	
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Sheet 5 of 5

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REVISIONS
TLE 1-9-26
TLE 3-17-26

Job No. 6997 **Drawing file: Easement Plat.dwg** **Drawing no. 25/54**

File #: 26-262 **Agenda Date:** 6/1/2026

TITLE:

Amendments to Chapter 20 of the Union County Code

INFORMATION CONTACT:

Jon Williams, Fire Marshal's Office, Fire Marshal, 704-296-4296

ACTION REQUESTED:

Adopt ordinance to amend Chapter 20 of the Union County Code.

PRIOR BOARD ACTIONS:

Board of County Commissioners passed and approved a fire code ordinance on February 1st, 1993.

BACKGROUND:

Our current ordinance was enacted in February of 1993. The revised ordinance reflects updated civil penalties and revisions to the issuance of permits for pyrotechnics. The revised ordinance also requests that the North Carolina Building Code Council grant our request that a mandatory permit be issued for mobile food preparation vehicles, more stringent requirements for combustible landscaping materials and gates and adoption of Appendices B, C, and D. These appendices are as follows: Fire-flow Requirements for Buildings, Fire Hydrant Locations & Distribution, and Fire Apparatus Access Roads.

FINANCIAL IMPACT:

None.

ORDINANCE AMENDING CHAPTER 20 OF THE UNION COUNTY CODE

WHEREAS, the Union County Board of Commissioners (the "Board") is authorized pursuant to N.C. Gen. Stat. § 153A-121 and N.C. Gen. Stat. § 153A-233 to adopt ordinances for the protection of the public health, safety, and welfare, including fire prevention and protection measures; and

WHEREAS, Chapter 20 of the Union County Code currently establishes regulations and penalties related to fire prevention within the County; and

WHEREAS, the Board finds that it is necessary and appropriate to update and modernize its fire prevention regulations and to clarify local enforcement provisions consistent with state law; and

WHEREAS, the Board has determined that it is in the best interests of Union County and its residents to amend Chapter 20 as hereinafter set forth.

NOW, THEREFORE, BE IT ORDAINED by the Union County Board of Commissioners as follows:

1. Chapter 20, "Fire Prevention," of the Union County Code is hereby amended and restated in its entirety as set forth in Exhibit A, attached hereto and incorporated herein by reference.

2. This Ordinance shall become effective 14 days after the date of its adoption.

Adopted this ____ day of _____ 2026.

_____
Brian Helms
Chair, Union County Board of Commissioners

Exhibit A

Sec. 20-1. - DUTIES OF CERTAIN OFFICIALS

Within the North Carolina Fire Code, when reference is made to the duties of certain officials named therein, that designated official of Union County who has duties corresponding to those of the named official in said code and who has been designated by the Union County Board of County Commissioners shall be deemed to be the responsible official insofar as enforcing the provisions of said code are concerned.

Sec. 20-2. - FIRE PREVENTION CODE ADOPTION

(a) Except as hereinafter amended, the provisions of the North Carolina Fire Prevention Code which include appendices B, C, and D (hereafter referred to as the N.C. Fire Code) current edition, adopted by the North Carolina Building Code Council is hereby adopted and made applicable as the Fire Prevention Code of Union County. The specific provisions of the aforesaid state building code herein referred to as the fire prevention code are hereby incorporated into this section as fully as if set out herein verbatim.

(b) The listed standards and publications which comprise a part of the fire prevention code, as the same may be periodically revised and updated, shall be applicable and enforced within the county.

(c) Amendments to the N.C. Fire Code, which are adopted and published by the North Carolina Building Code Council, shall be effective on the date prescribed by the North Carolina Building Code Council.

(d) The North Carolina State Building Code volume that is titled Administrative and Enforcement Requirements is hereby referenced for the administration of the N.C. Fire Code, current edition for periodic inspection of buildings altered, repaired or rehabilitated in accordance with the existing building code.

(e) This ordinance shall apply within the unincorporated areas of Union County and any municipality which has previously consented to the County's exercise of fire code enforcement jurisdiction. Nothing herein is intended to create, eliminate, or modify any municipal consent or authorization for fire code enforcement by the Union County Fire Marshal's Office. Pursuant to N.C. Gen. Stat. § 153A-122, this ordinance may also apply within the boundaries of any municipality located within Union County, upon the municipality's adoption of a resolution authorizing its enforcement.

Sec. 20-3. - VIOLATION OF TECHNICAL CODE

(a) Any act constituting a violation of the provisions of the N.C. Fire Code shall subject the offender to a civil penalty for each violation in the amount set out below:

Open Burning Violation (Violation of Air Quality or Burn Ban):	First Offense (within a 12-month period)	Second Offense (within a 12-month period)	Third Offense (within a 12-month period)	Subsequent Violations (within a 12-month period)
Residential or Commercial	Written Notice	$250.00	$500.00	$ 750.00

	First Offense	Second Offense
Means of Egress	$250.00 per day	
Overcrowding	$250.00 per day	
Locked Exit/Exit Obstruction	$500.00 per offense	$1,000.00 per offense
Fire Detection/Protection	$250.00 per offense	$500.00 per day

Means of Egress: Unless otherwise noted, civil penalties of $250 per day may be issued after three written notices, and no less than seventy-five (75) days from the issuance of the initial notice (the "Notice Requirement"). No further notice shall be required for the issuance of the civil penalty. Violations for overcrowding, locked exit/exit obstruction, and fire detection/protection shall not be subject to the Notice Requirement.

Overcrowding: Civil penalties may be issued at first offense without prior notice.

Locked Exit/Exit Obstruction: Civil penalties may be issued at first offense without prior notice.

Fire Detection/Protection: Civil penalties may be issued at first offense without prior notice.

Each day any violation continues after notification by the Fire Marshal or his designee that such violation exists shall be considered a separate offense for purposes of assessing the civil penalties stated herein.

(b) Civil penalties are assessed in accordance with N.C. Gen. Stat. § 153A-123.

(c) Civil penalties may be assessed by the Fire Marshal or their designee upon the issuance of a written citation, or the issuance of a notice of violation ("NOV"). The citation or the NOV may be delivered to the offender in person or may be mailed by registered or certified mail to the offender at his last known address.

(d) If the offender fails to pay the civil penalty within ten days after being cited for a violation, the penalty may be recovered by the county in a civil action in the nature of debt. In accordance with N.C. Gen. Stat. Chapter 105A, debts owed to the County in excess of fifty dollars ($50.00) may be collected through the North Carolina Local Government Debt Setoff Clearinghouse Program.

(e) The civil penalties assessed pursuant to this section shall be in addition to and not in lieu of, injunctive or equitable relief, or other remedies available for violations of the N.C. Fire Code.

Sec. 20-4. - Pyrotechnic Display Permits for Public Exhibitions

(a) The Board of County Commissioners retains all authority granted under N.C. Gen. Stat. § 14-413 to issue permits for the exhibition, use, or discharge of pyrotechnics and hereby designates the Union County Fire Marshal's Office as its agent for the purpose of receiving, reviewing, and issuing such permits on behalf of the Board within Union County.

(b) Pursuant to N.C. Gen. Stat. § 14-413(a1), a city within Union County may issue permits for the exhibition, use, or discharge of pyrotechnics within its corporate limits only if the Board of County Commissioners has adopted a resolution expressly authorizing the city to do so. Any such authorizing resolution in effect at the time of adoption of this ordinance shall remain valid unless and until withdrawn by subsequent resolution of the Board of County Commissioners.

(c) Except as provided in subsection (b), no person shall engage in the use of pyrotechnics for public display within Union County without first submitting a completed application to and obtaining a permit from the Union County Fire Marshal's Office at least twenty (20) days in advance of the proposed display. The names and addresses of all operators and assistants shall appear on the application, and a copy of the license issued by the North Carolina Office of State Fire Marshal for each operator and assistant shall be submitted with the application. No permit shall be issued by the Union County Fire Marshal's Office, or by any city authorized to issue permits, unless the proposed display fully complies with all applicable provisions of this chapter, the North Carolina State Fire Code, and N.C. Gen. Stat. § 14-413.

(d) A permit shall not be issued under this section unless the display operator provides proof of a bond or certificate of insurance in an amount of at least five hundred thousand dollars ($500,000), or the minimum amount required under the North Carolina State Building Code pursuant to G.S. 143-138(e), whichever is greater.

Sec. 20-5. - COMBUSTIBLE LANDSCAPING MATERIALS

No pine straw or any other landscape cover material with a fire rate of spread more than 24 inches per minute shall be placed, kept, or stored within 10 feet of buildings with combustible exterior construction including, but not limited to, vinyl, aluminum, Masonite, or wood siding.

(a) Exception: This provision shall not apply to one- and two-family dwellings as defined in Section R101.2 of the N.C. Fire Code. Excludes pine straw that falls from trees located on the same parcel as the building.

(b) Civil Penalties: Violations not abated within 7 days of written notice shall constitute a $250.00 per day civil penalty.

(c) Existing conditions: All existing pine straw as of the date of adoption of this ordinance may remain, however, the placement of any additional pine straw within 10 feet of combustible exterior construction is prohibited.

(d) The provisions of this section shall become effective thirty days after the date of adoption of this ordinance.

Sec. 20-6. - OPEN BURNING

Open burning shall be conducted in accordance with the N.C. Fire Code and all applicable state air quality and solid waste disposal laws, North Carolina Forest Service and any other applicable state regulations.

Sec. 20-7. - MOBILE FOOD PREPARATION VEHICLES

A permit issued by the Union County Fire Marshal's Office is required for mobile food preparation vehicles equipped with appliances that produce smoke or grease-laden vapors. A mobile food preparation vehicle is defined as a vehicle that contains cooking equipment that produce smoke or grease-laden vapors for the purpose of preparing and serving food to the public. Vehicles intended for private recreation shall not be considered mobile food preparation vehicles. Mobile food preparation vehicles shall meet the requirements as listed in the N.C. Fire Code.

Sec. 20-8. - GATES

No person shall install or cause to be installed any gate, barrier, or other obstruction across a fire apparatus access road, unless the design, placement, and means of emergency operation have been approved in advance by the Union County Fire Marshal, in coordination with the chief of the local fire department with jurisdiction over the area. The clear width of the roadway shall be a minimum of twenty feet clear width on all entrances and exit roadways shall be a minimum of sixteen feet width or larger on all exits, unless otherwise approved by the Union County Fire Marshal. Operation of an electric gate shall be by preemption device (siren from an emergency vehicle) and Knox Key Switch. Operation of an approved manual gate shall be by a Knox Box or Knox Lock, unless otherwise approved. The gates and the emergency operation shall always be operational.

File #: 26-328 **Agenda Date:** 6/1/2026

TITLE:

Grant Application - Meals on Wheels America Meeting Unmet Need Acceleration Gift Distribution

INFORMATION CONTACT:

Stephanie Starr, Human Services Agency - Department of Community Support and Outreach, Director, 704-296-4302

ACTION REQUESTED:

Authorize the County Manager to submit the associated grant application and make necessary assurances and certifications associated with the grant application as substantially consistent with this agenda item, which includes the authorization to execute documents related to the award of the grant and budget funds as appropriate.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

In April 2026, Meals on Wheels America (MoWA) announced that philanthropist MacKenzie Scott made a $70 million unrestricted gift to support its national network. MoWA is using this investment to strengthen and expand local providers' capacity to meet the growing demand for senior nutrition services nationwide.

As part of this effort, Meals on Wheels America established the Meeting Unmet Need Acceleration Investment, a $10 million initiative designed to support providers experiencing high demand. Acceleration Gift Distributions provide $10,000 to member organizations with active waitlists for meals.

These distributions are non-competitive and require only the completion of a brief acknowledgment form to accept funding. Recipients are not subject to additional reporting requirements, and no local match is required.

Union County was contacted about the availability of these funds on 5/20/26 and will be required to sign documentation by 6/10/26 to receive the $10,000. The funds will be utilized to purchase meals.

FINANCIAL IMPACT:

$10,000 will be awarded with no required match.

File #: 26-285 **Agenda Date:** 6/1/2026

TITLE:

Appointment of Deputy Finance Officer

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

Appoint Aries Tanggani, Accountant, to serve as a “Deputy Finance Officer” in order to pre-audit obligations.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

G.S. 159-8 directs that no county "may expend any moneys…except in accordance with a budget ordinance or project ordinance."

The pre-auditing of obligations, required by G.S. 159-28(a), is a principal legal mechanism for assuring compliance with the budget ordinance and each project ordinance. The pre-audit rule provides that no obligation may be incurred in an activity accounted for in a fund project ordinance unless two requirements are met. First, the obligation must be authorized; that is, one of the ordinances must contain an appropriation to cover it. Second, the authorization must not be exhausted; sufficient unspent and unencumbered funds must remain in the appropriation to meet the obligation when it comes due. Only if both requirements are met is the obligation validly incurred.

Completion of this two-stage review is evidenced by placing the finance officer's certificate on the obligations. Having the deputy finance officer authorized to pre-audit obligations is important and such delegation will occur only with the approval of the County's finance officer and only when adequate internal controls are built into the payment procedures that are used.

FINANCIAL IMPACT:

None.

File #: 26-322 **Agenda Date:** 6/1/2026

TITLE:

NC Department of Public Safety - Juvenile Crime Prevention Council Funding FY 2026

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

1) Approve revised County Funding Allocation Plan FY 2025-2026, 2) authorize the Finance Director to approve the funding plan, grant agreements and documents related to such grant agreements during their terms, and 3) adopt Budget Amendment #24.

PRIOR BOARD ACTIONS:

1) June 16, 2025, Regular Meeting, Agenda Item 25-383 - Approved County Funding Plan for FY 2025-2026, Authorized the Finance Director to approve the grant agreements and documents related to such grant agreements during their term, and authorized the County Manager to appropriate JCPC Funding as approved in the funding plan by a County Manager's Budget Amendment in FY 2026.

2) May 4, 2026, Regular Meeting, Agenda Item 26-244 - Approved Discretionary Award for FY 2025-2026, authorized the Finance Director to approve an updated funding plan, grant agreements and documents related to these additional funds during their terms, and approved Budget Amendment #22.

BACKGROUND:

The Juvenile Crime Prevention Council (JCPC) is a Board appointed by Commissioners, as defined by State Statutes. The JCPC provides funding and monitors Community Based alternatives to juvenile incarceration and provides funding for substance abuse prevention strategies and programs.

Funding for JCPC programs is generally adopted in the State Budget and assigned to County programs by a formula grant. Normally, a county JCPC approves a budget for the upcoming fiscal year, which is then submitted to the North Carolina Department of Public Safety Juvenile Justice and Delinquency Prevention (the DJJ). The attached revised funding plan was developed and approved by the JCPC Board and represents the Board's plan for how the funds will be spent for the 2025-2026 fiscal year.

The JCPC budget is normally approved as a "pass-through" line-item in the County budget, meaning that the amount approved by the State is received by the County and then used for the JCPC program.

Union County has not approved JCPC programs in line-item detail in the past; rather, the JCPC

Board normally negotiates, approves, and monitors line-item detail within the amount of funds allocated to the program, and provides a recommended budget to Commissioners.

FINANCIAL IMPACT:

None.

Docusign Envelope ID: 692F4126-F828-8569-810E-6EFD56CC8B3D

Union County

NC DPS - Community Programs - County Funding Plan

Available Funds: $ **$476,439** Local Match: $ **$163,907** Rate: **30%**

DPS JCPC funds must be committed with a Program Agreement submitted in NC Allies and electronically signed by authorized officials.

#	Program Provider	DPS-JCPC Funding	LOCAL FUNDING			OTHER	OTHER	Total	% Non DPS-JCPC Program Revenues
			County Cash Match	Local Cash Match	Local In-Kind	State/ Federal	Funds		
1	Life Connections of the Carolinas-DASH Counseling Services	$147,853			$44,712			$192,565	23%
2	Transforming Youth Movement, INC- Transforming Futures	$132,983		$250	$40,800			$174,033	24%
3	Aspire Youth & Family, Inc-Kids At Work! Union	$71,573		$6,928	$21,100			$99,601	28%
4	Union County-JCPC Administration	$10,229						$10,229	
5	A.R.I.S.E- Union-Kre8ivu	$60,000			$30,000			$90,000	33%
6	Parenting Support	$8,461			$3,797			$12,258	31%
7	Transforming Youth Movement-Union County Teen Court Program	$47,790			$16,320			$64,110	25%
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
	TOTALS:	$478,889		$7,178	$156,729			$642,796	25%

The above plan was derived through a planning process by the Union County Juvenile Crime Prevention Council and represents the County's Plan for use of these funds in FY 2025-2026.

Amount of Unallocated Funds _____

Amount of funds reverted back to DPS _____

Discretionary Funds added $2,450

Signed by:
John J. Kirkpatrick, IV 5/20/2026
D0C145463Q844C9...
Chairperson, Juvenile Crime Prevention Council (Date)

check type ☐ initial plan ☑ update ☐ final

-----DPS Use Only-----

Reviewed by Sherri Hill 5.14.26
Area Consultant Date

Reviewed by _____
Program Assistant Date

Verified by _____
Designated State Office Staff Date

Chairperson, Board of County Commissioners or County Finance Officer (Date)

ver 03/02/21

BUDGET AMENDMENT

BUDGET	Finance	REQUESTED BY	JCPC
FISCAL YEAR	FY 2026	DATE	June 01, 2026

INCREASE

Description	
State Grants	-
Salaries & Benefits, Op Exp, & Pmts to Outside Agencies	-

DECREASE

Description	

Explanation: Reallocate funding for Juvenile Crime Prevention Program (JCPC) programs as outlined in the revised FY 26 Funding Plan.

DATE 6/1/2026

APPROVED BY

Bd of Comm/County Manager
Lynn West/Clerk to the Board

FOR POSTING PURPOSES ONLY

DEBIT

Code	Account	Amount
10114450-5699-17602	Payments to Other Agencies	1,261
10114450-4441-17605	State Grant JCPC	3,781
10114450-5699-17611	Payments to Other Agencies	1,260
10114450-5699-17612	Payments to Other Agencies	1,260
	Total	7,562

CREDIT

Code	Account	
10114450-4441-17602	State Grant JCPC	1,261
10114450-5121-17605	Salaries & Wages	1,503
10114450-5131-17605	FICA Contributions	115
10114450-5134-17605	401-K Supp Ret Plan - Other	75
10114450-5136-17605	Ret Contrib.- Other Employees	168
10114450-5220-17605	Food & Provisions	200
10114450-5260-17605	Printing & Office Supplies	1,100
10114450-5383-17605	Medical Services	620
10114450-4441-17611	State Grant JCPC	1,260
10114450-4441-17612	State Grant JCPC	1,260
	Total	7,562

Prepared By
Posted By
Date

Number 24

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-303 **Agenda Date:** 6/1/2026

TITLE:

Compensation Adjustment for the Clerk to the Board

INFORMATION CONTACT:

Julie Broome, Human Resources, Director, 704-283-3869

ACTION REQUESTED:

Authorize the BOCC Chairman to take administrative action as necessary to provide an annual increase in compensation of $9,605.12 to the Clerk to the Board, effective January 1, 2026.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Pursuant to G.S. 153A-92(a), the Board of County Commissioners is charged with the responsibility of determining the compensation of all county officers and employees, including the appointed position of the Clerk to the Board.

FINANCIAL IMPACT:

No additional funding required. Sufficient funding is available in the FY2026 budget.

File #: 26-305 **Agenda Date:** 6/1/2026

TITLE:

Compensation Adjustment for the County Manager

INFORMATION CONTACT:

Julie Broome, Human Resources, Human Resources Director, 704-283-3869

ACTION REQUESTED:

Authorize the BOCC Chairman to take administrative action necessary to provide an annual increase in compensation of $7,046.88 to the County Manager effective January 1, 2026.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Pursuant to G.S. 153A-92(a), the Board of County Commissioners is charged with the responsibility of determining the compensation of all county officers and employees, including the appointed position of the County Manager.

FINANCIAL IMPACT:

No additional funding required. Sufficient funding is included in the FY2026 budget.

File #: 26-306 **Agenda Date:** 6/1/2026

TITLE:

Compensation Adjustment for the County Attorney

INFORMATION CONTACT:

Julie Broome, Human Resources, Human Resources Director, 704-283-3869

ACTION REQUESTED:

Authorize the BOCC Chairman to take administrative action necessary to provide an annual increase in compensation of $7,046.88 to the County Attorney, effective January 1, 2026.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Pursuant to G.S. 153A-92(a), the Board of County Commissioners is charged with the responsibility of determining the compensation of all county officers and employees, including the appointed position of the County Attorney.

FINANCIAL IMPACT:

No additional funding required. Sufficient funding is included in the FY2026 budget.

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-310 **Agenda Date:** 6/1/2026

TITLE:

Union County CDBG 2026-2030 Consolidated Plan and 2026 Annual Action Plan

INFORMATION CONTACT:

Monica Culbreath, County Manager's Office, Grant Specialist, 704-283-3580

ACTION REQUESTED:

1) Adopt the Union County 2026-2030 Consolidated Plan and the 2026 Annual Action Plan; 2) authorize the County Manager to execute the required submittal documents to the U.S. Department of Housing and Urban Development (HUD); and 3) authorize the County Manager to negotiate and execute agreements with Community Development Block Grant (CDBG) subrecipients substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County became a HUD Entitlement Community in 2016 and began receiving annual Community Development Block Grant (CDBG) funding on July 1, 2016. The purpose of the CDBG program is to develop viable communities by providing decent housing, a suitable living environment, and expanded economic opportunities principally for low- and moderate-income persons. Eligible activities include housing rehabilitation, public services, public facilities and infrastructure improvements, economic development, planning, and administration.

As required by HUD, entitlement communities must prepare and submit a five-year Consolidated Plan that identifies community needs, establishes priorities, and outlines a strategic plan for the use of federal housing and community development funds. The 2026-2030 Consolidated Plan serves as Union County's strategic planning document for the upcoming five-year period.

Additionally, HUD requires the submission of an Annual Action Plan each program year to identify the specific projects and funding allocations proposed for that year. The 2026 Annual Action Plan represents the first program year of the 2026-2030 Consolidated Plan and covers the period beginning July 1, 2026, and ending June 30, 2027.

The County conducted the required citizen participation process, including public notices and public hearings, to obtain community input regarding housing, community development, and public service needs prior to preparation of the plans.

FINANCIAL IMPACT:

The requested amount for the 2026 Annual Action Plan is $843,937.00. This amount represents the total allocation Union County is eligible to receive from HUD for the FY2026-2027 program year.

FY 2026-2030
Five-Year Consolidated Plan
and
FY 2026 Annual Action Plan

For Submission to HUD for the
Community Development Block Grant Program

Brian Matthews, County Manager

County Commission:
Brian Helms, Chair
Christina Helms, Vice Chair
Clancy Baucom
Melissa Merrell

Jason May, Budget & Grants Management Director

Union County Government Center
Budget & Grants Management Department
500 North Main Street
Monroe, NC 28112

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FY 2026-2030 Five-Year Consolidated Plan and FY 2026 Annual Action Plan

Executive Summary

ES-05 Executive Summary - 24 CFR 91.200(c), 91.220(b)

1. Introduction

Union County, North Carolina is an entitlement community under the U.S. Department of Housing and Urban Development's (HUD) Community Development Block Grant (CDBG) Program. The County became an Entitlement Grantee in 2016 and began receiving an annual allocation of Community Development Block Grant (CDBG) funds from the U.S. Department of Housing and Urban Development (HUD) July 1, 2016. As a recipient of CDBG funds, the County is required to prepare a five-year strategic plan that identifies housing and community needs and prioritizes these needs, identifies resources to address needs, and establishes annual goals and objectives to meet the identified needs. This five-year plan is known as the Consolidated Plan.

The purpose of the Consolidated Plan is to outline a strategy for the County to follow for the use of CDBG funding to achieve the goals of the CDBG program over the next five years. CDBG funds are intended to provide low- and moderate-income households with viable communities, including decent housing, a suitable living environment, and expanded economic opportunities. Eligible activities include public and community facility improvements, housing rehabilitation and

preservation, development activities, public services, economic development, planning, and administration.

This is the third Consolidated Plan for Union County and covers the period of July 1, 2026, through June 30, 2030. Preparation and approval of the Consolidated Plan is a prerequisite to the County's use of federal housing and community development funds. The Consolidated Plan was prepared in accordance with Sections 91.100 through 91.230 of HUD's Consolidated Plan Final Rule.

As an entitlement community, Union County will receive an annual share of federal CDBG funds. To receive its CDBG entitlement funding, the County must also submit an Annual Action Plan (AAP) to HUD each year during the five-year consolidated plan period. The Annual Action Plan describes the funding levels and activities to be undertaken during the individual upcoming program year for the CDBG program to address the priority needs and objectives as outlined in the Consolidated Plan. The Federal FY 2026 Annual Action Plan, which corresponds with Union County's Program Year 2026-2027, is the funding application for CDBG funds in the amount of $843,937.00 and includes information on the projects approved by Union County, to be implemented in the 2026 program year.

This Five-Year Consolidated Plan is a collaborative effort of Union County and its constituent municipalities, social service agencies and providers, housing providers, community development agencies, and economic development groups. The planning process was accomplished through a series of public meetings, stakeholder interviews, resident surveys, statistical data, and review of previous community development plans.

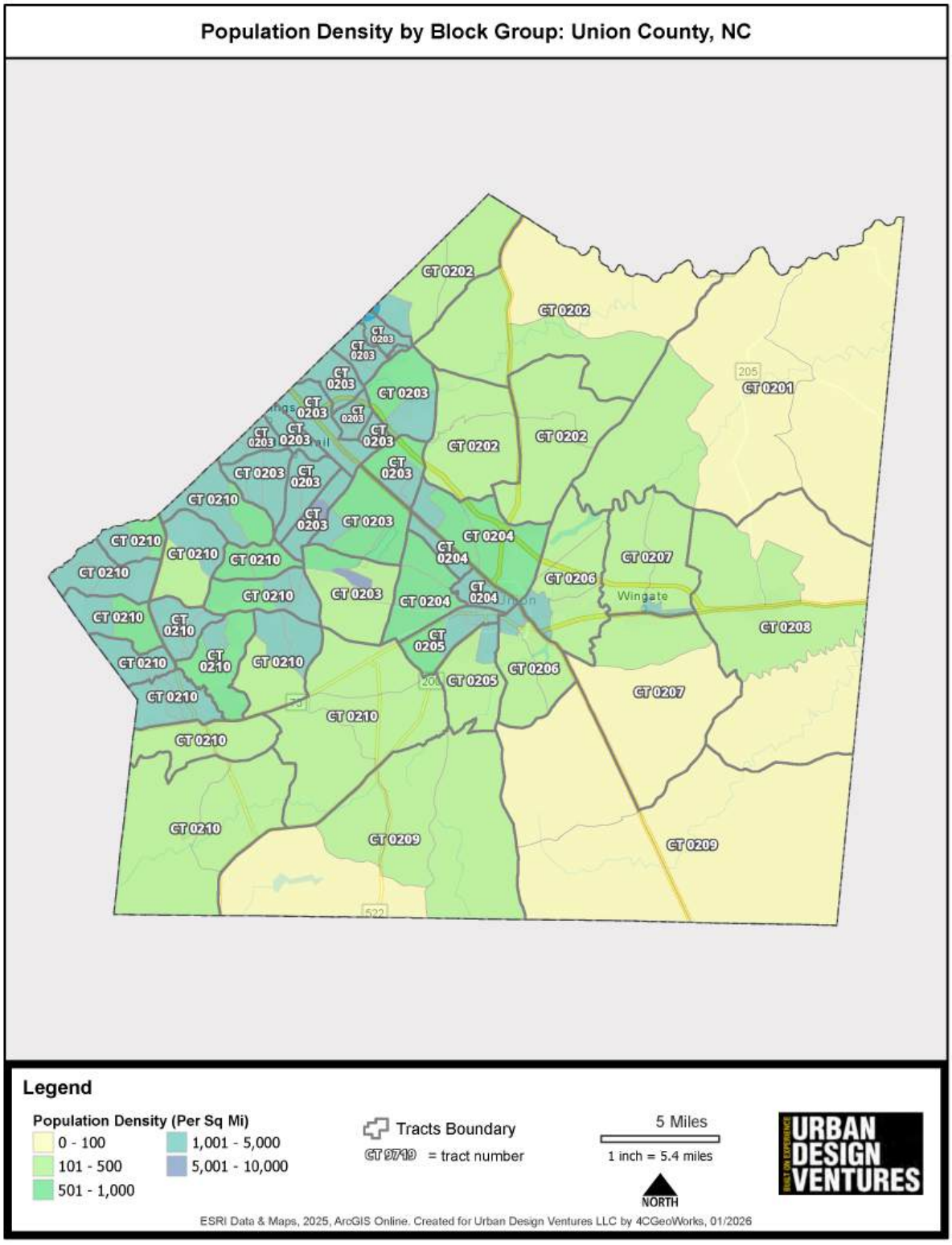
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Maps:

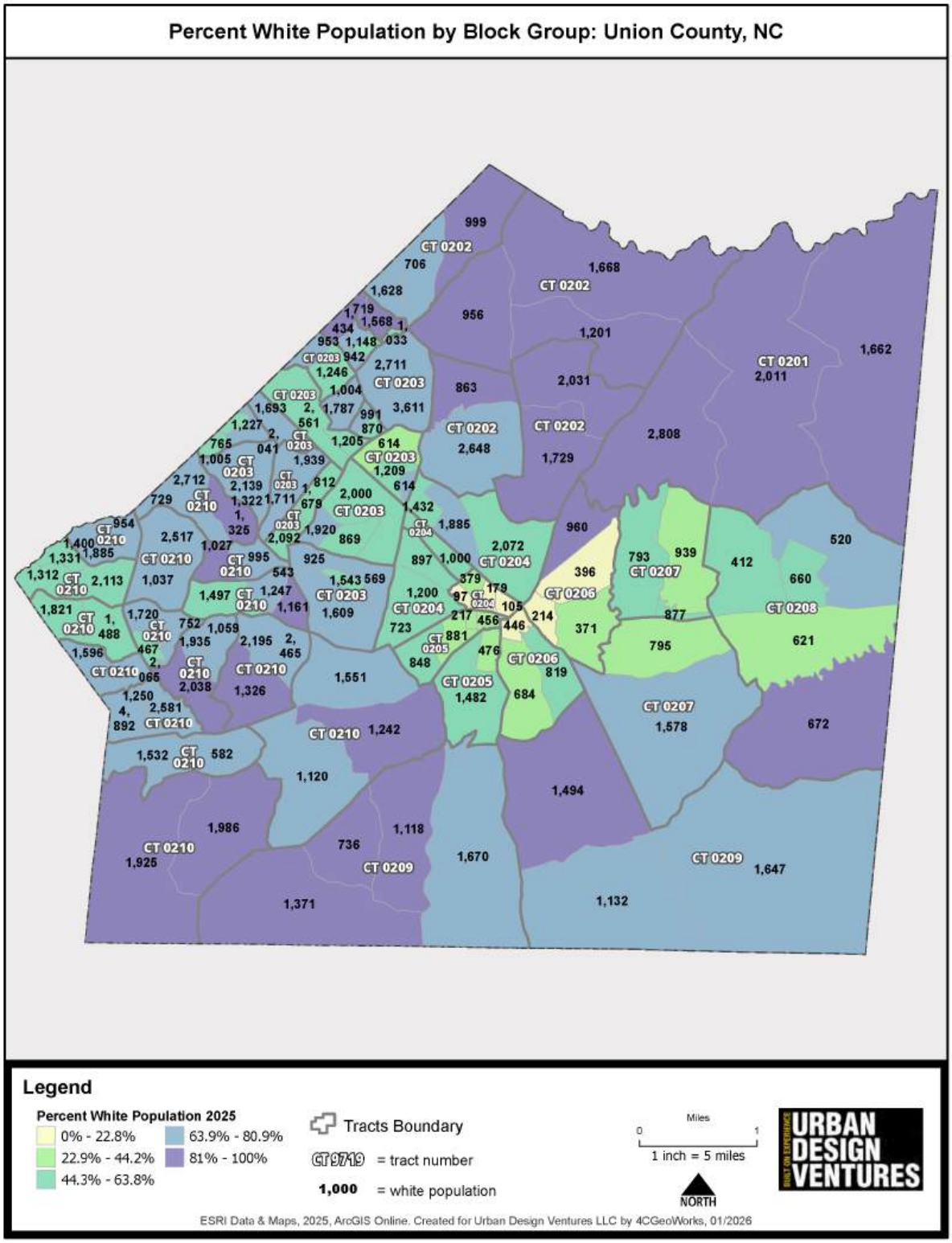
The following maps are included which illustrate the demographic characteristics of Union County:

- Population Density by Block Group
- Percent White Population by Census Tract
- Percent Hispanic Population by Census Tract
- Percent Minority Population by Block Group
- Percent Population Age 65+ by Census Tract
- Total Housing Units by Block Group
- Percent Owner-Occupied Housing Units by Census Tract
- Percent Renter-Occupied Housing Units by Census Tract
- Percent Vacant Housing Units by Census Tract
- Low/Moderate Income Percentage by Block Group
- Low/Moderate Income w/Minority Percentage by Block Group
- Commercial Hot Spots
- Percent Occupied Housing Units with No Vehicles by Block Group
- Percent of Households with Income Below Poverty Level by Block Group
- Voucher Concentration by Census Tract and Public Housing Developments
- Union County Municipalities and Townships
- Union County CDBG Program Participating Jurisdictions
- Union County Zoning Map

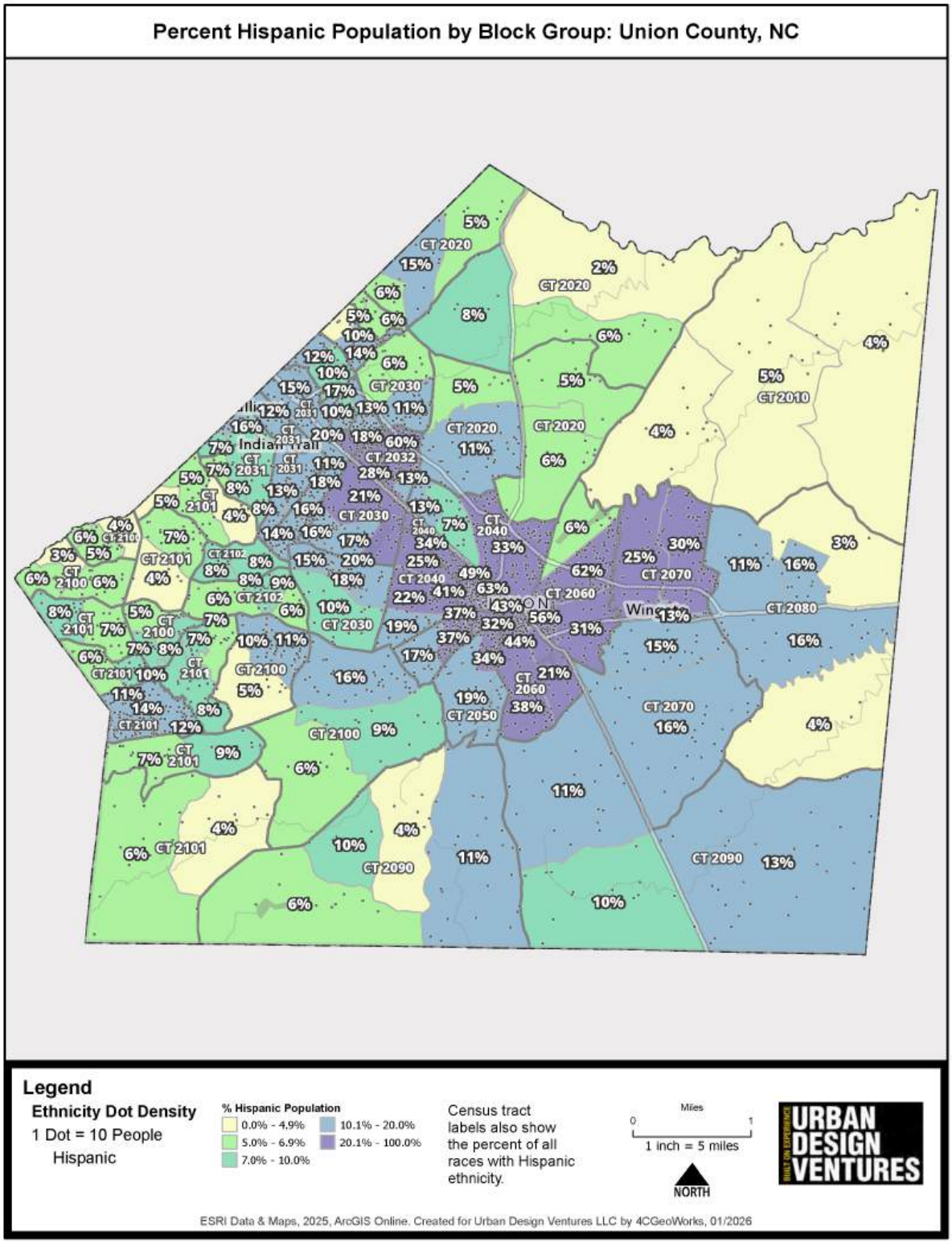
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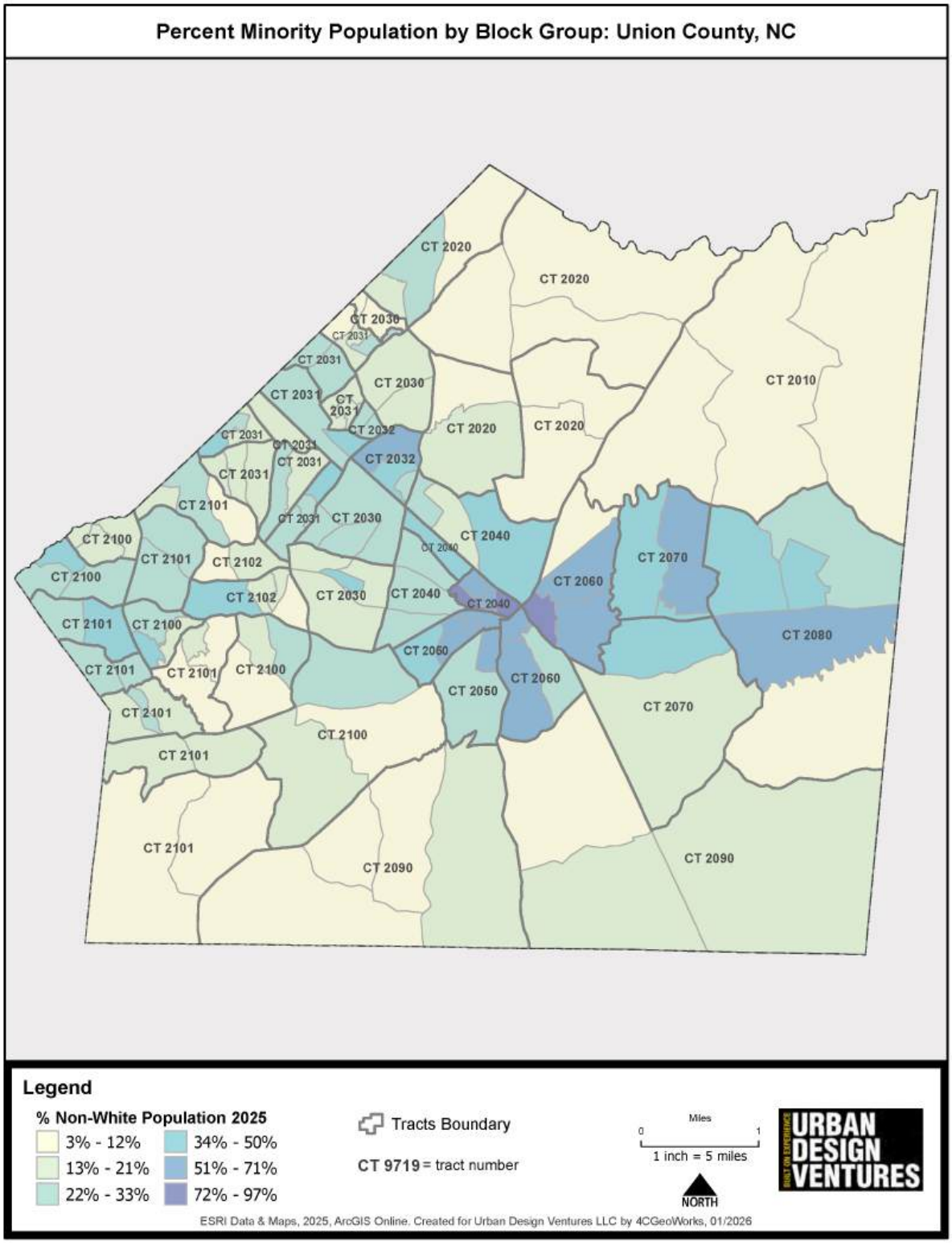
Population Density by Block Group



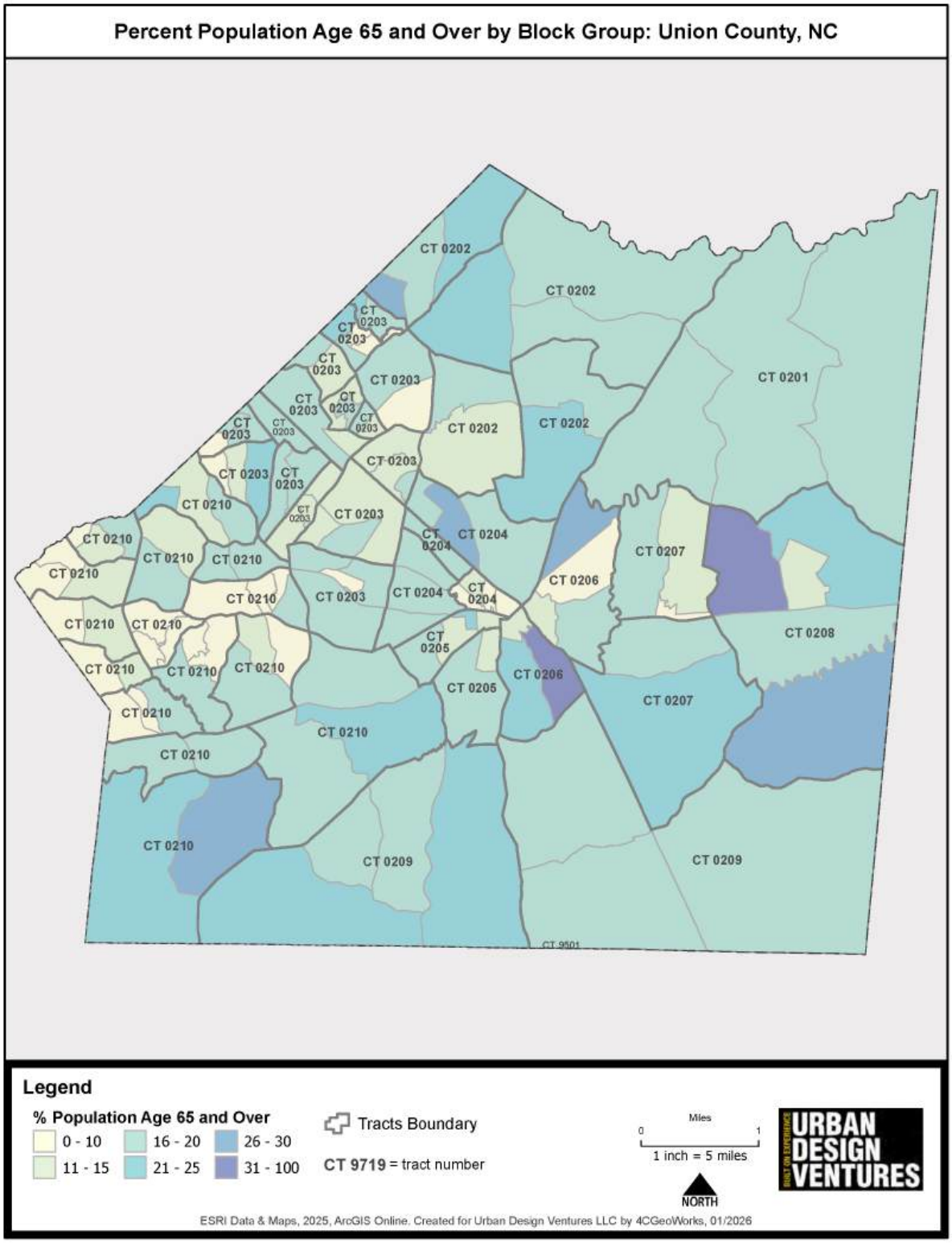
Percent White Population by Block Group



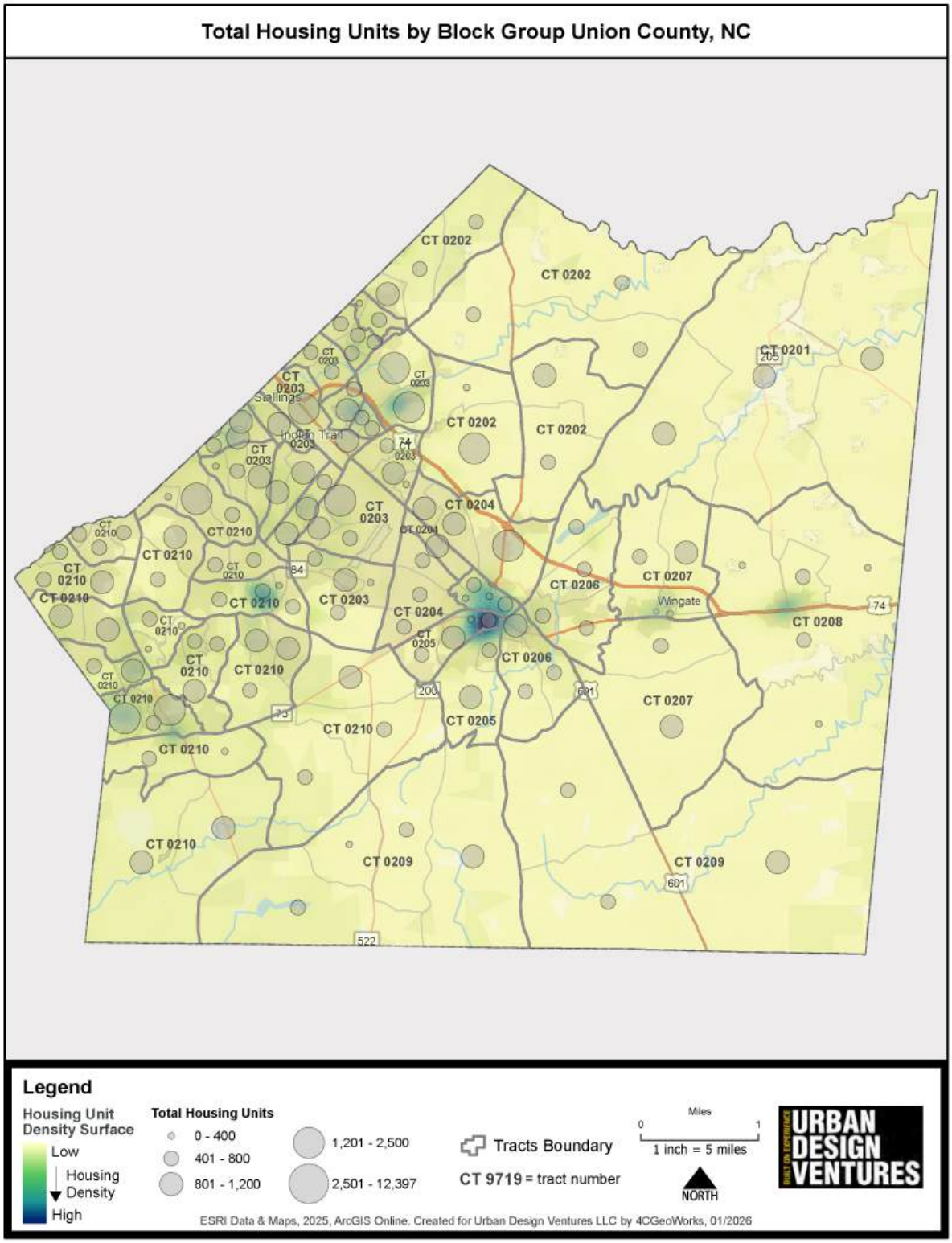
Percent Hispanic Population by Block Group



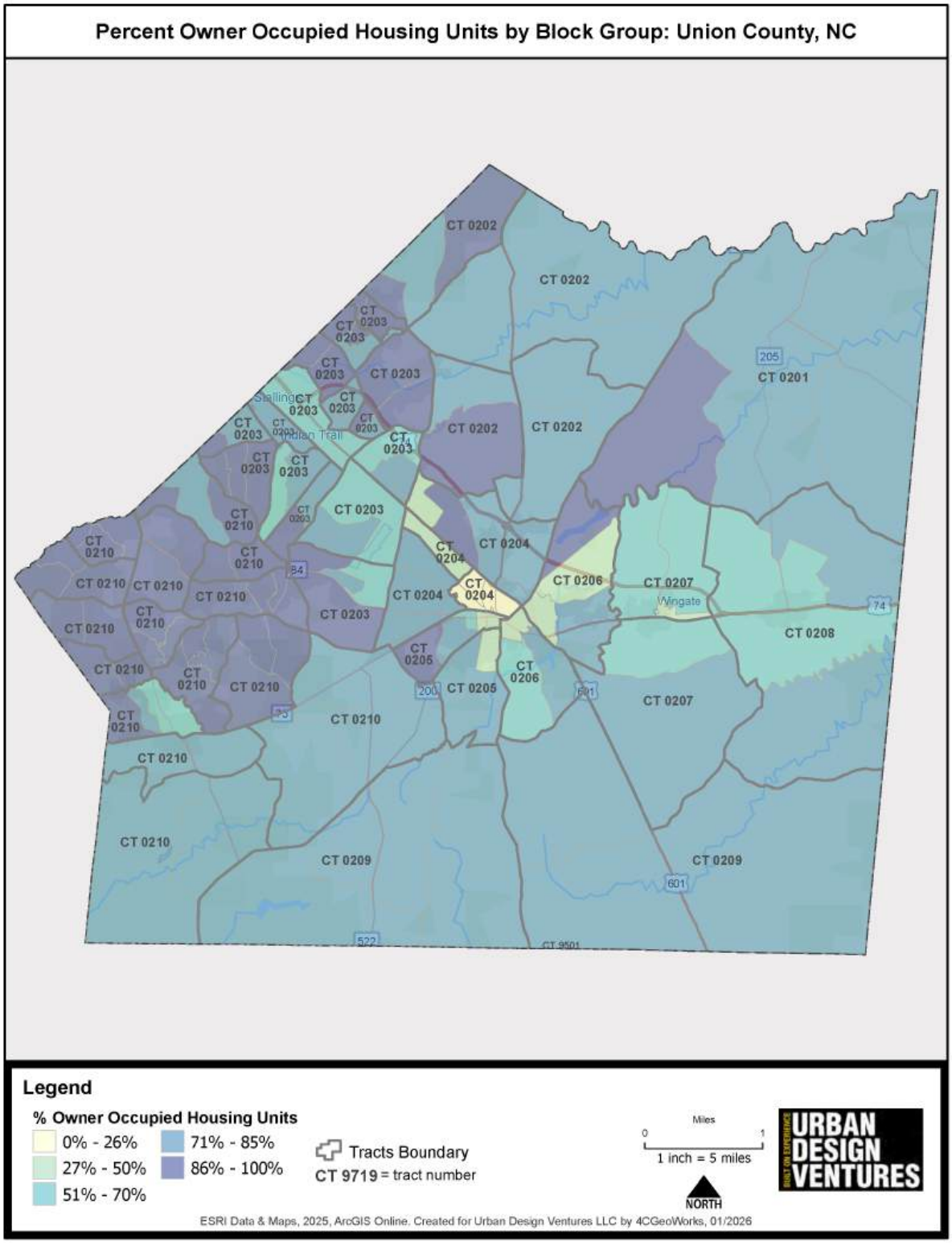
Percent Minority Population by Block Group



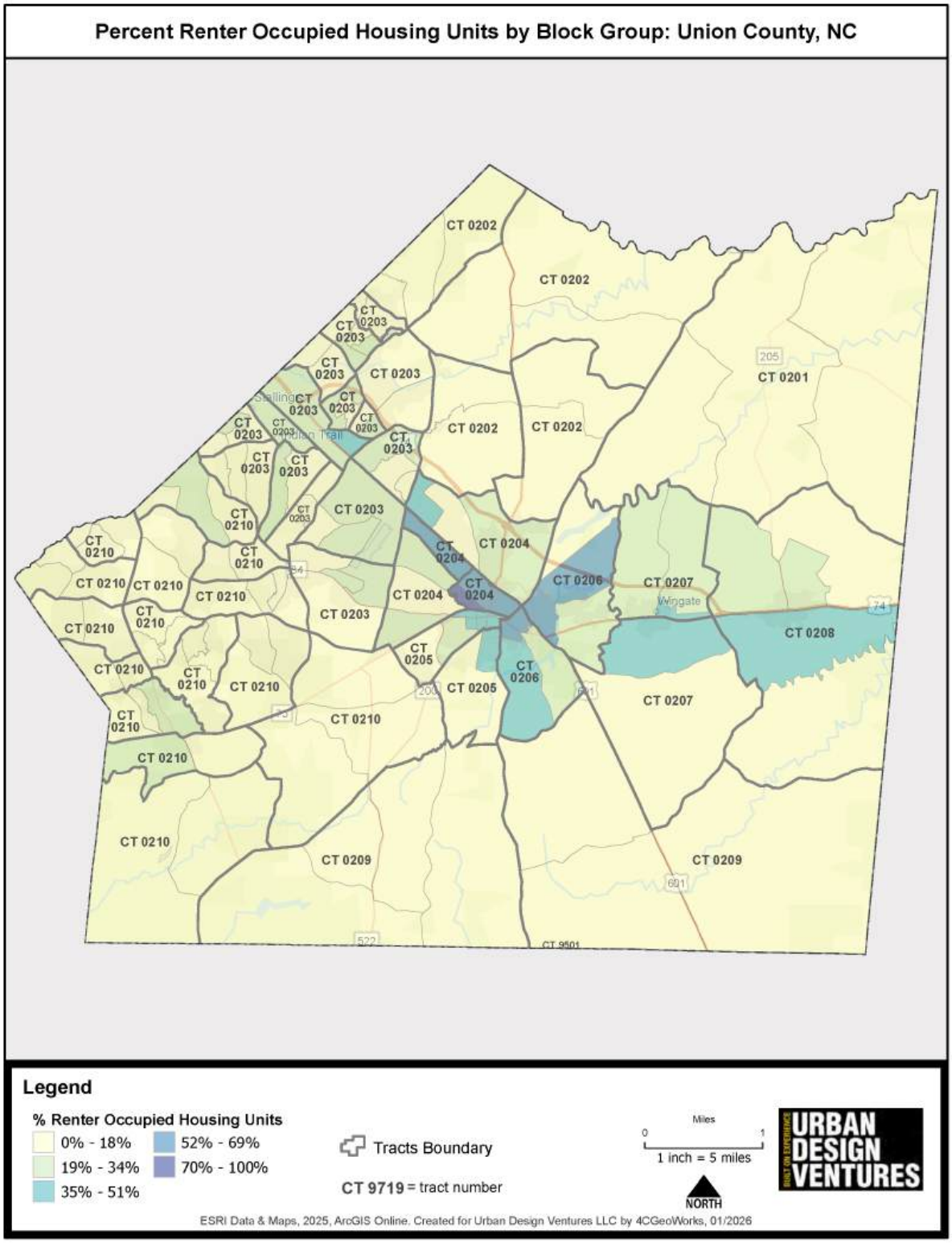
Percent Population 65 and Over by Block Group



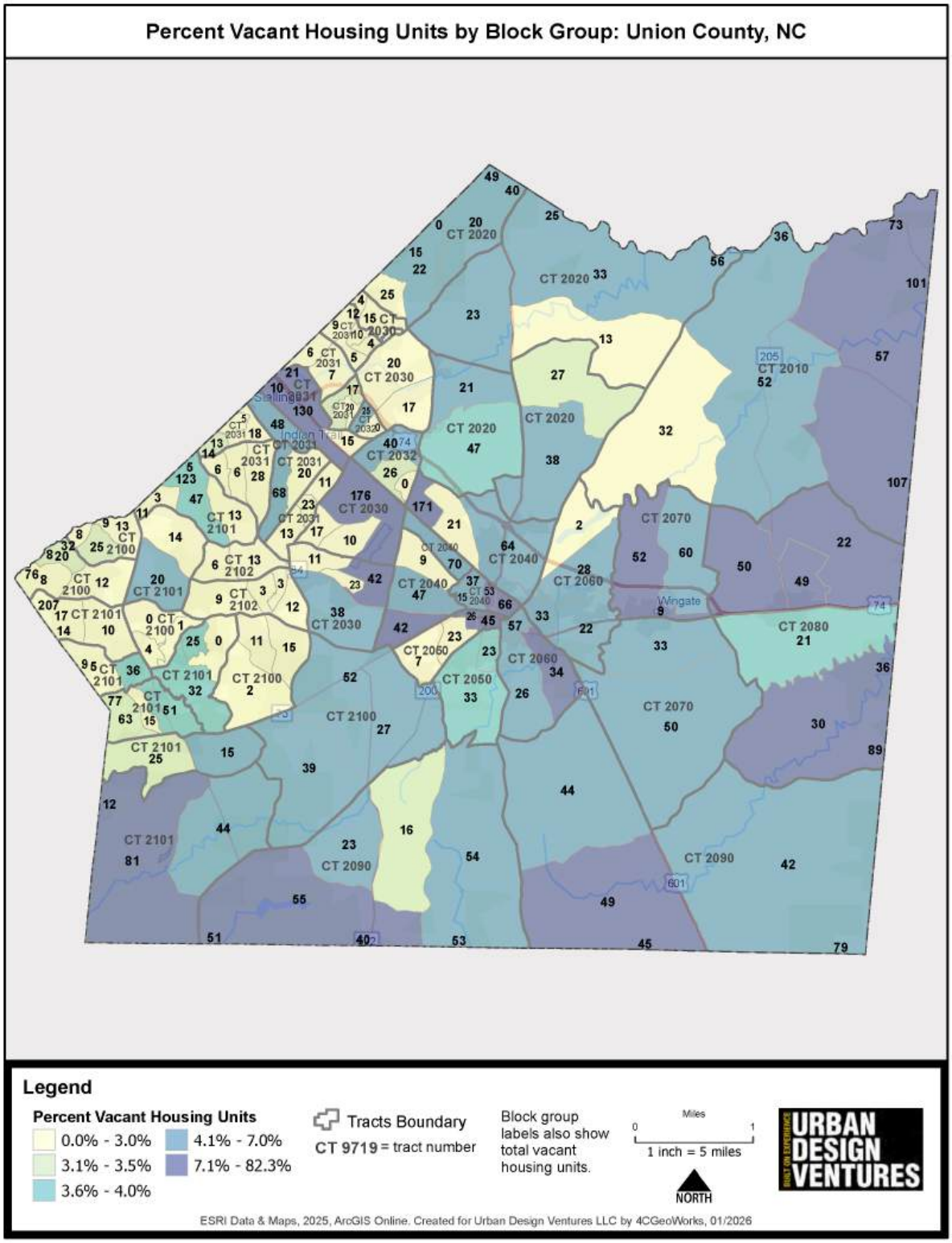
Total Housing Units by Block Group



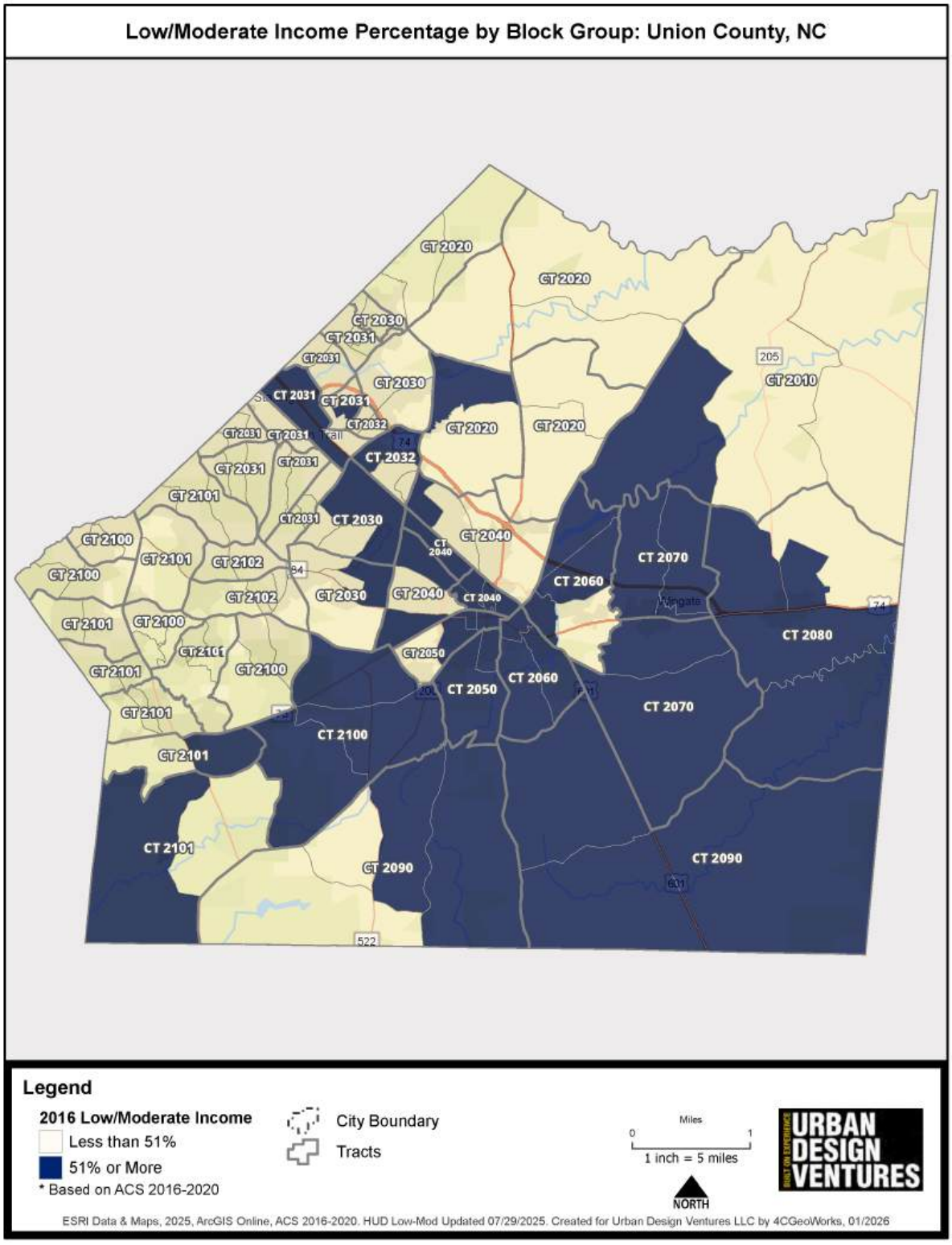
Percent Owner-Occupied Housing Units by Block Group



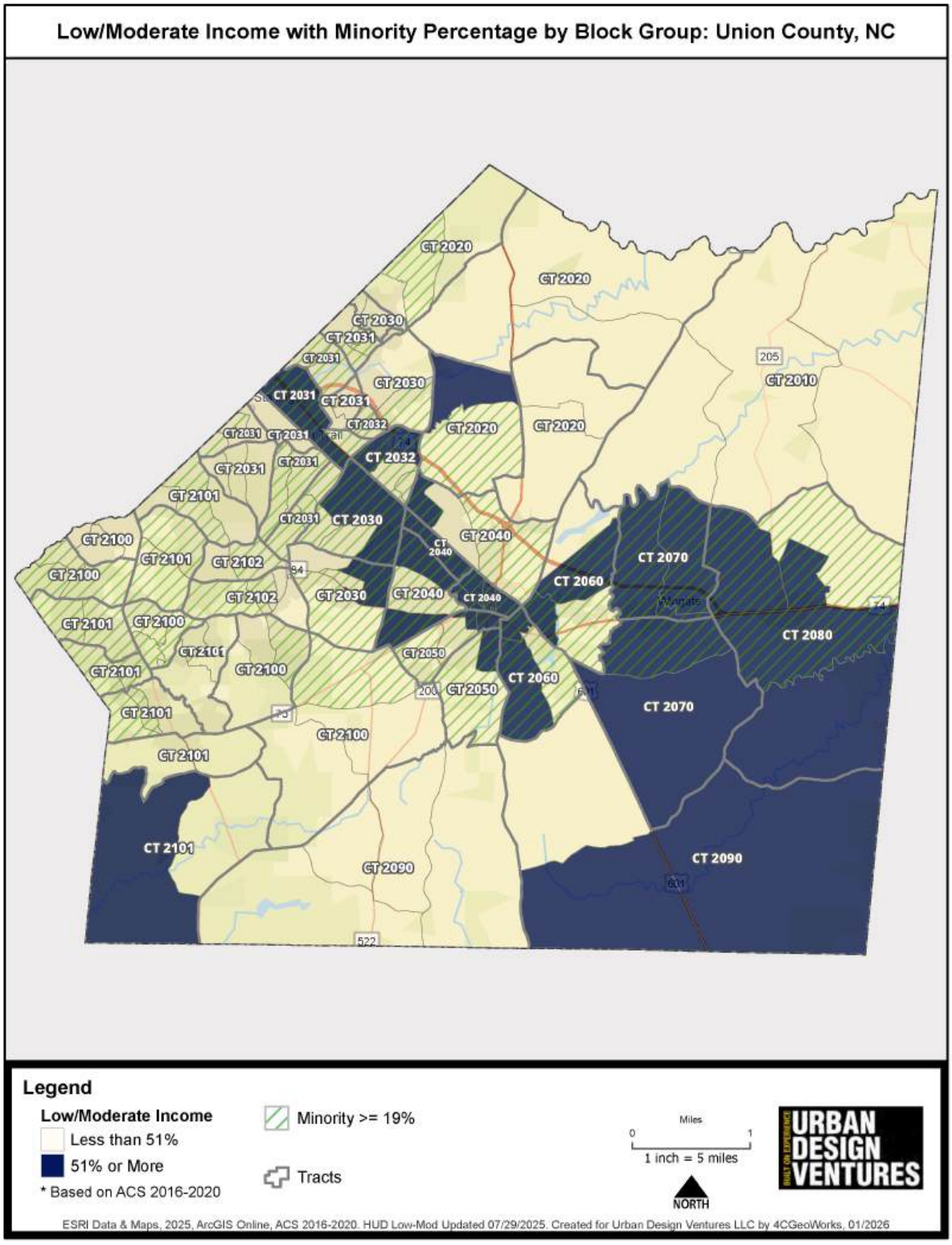
Percent Renter-Occupied Housing Units by Block Group



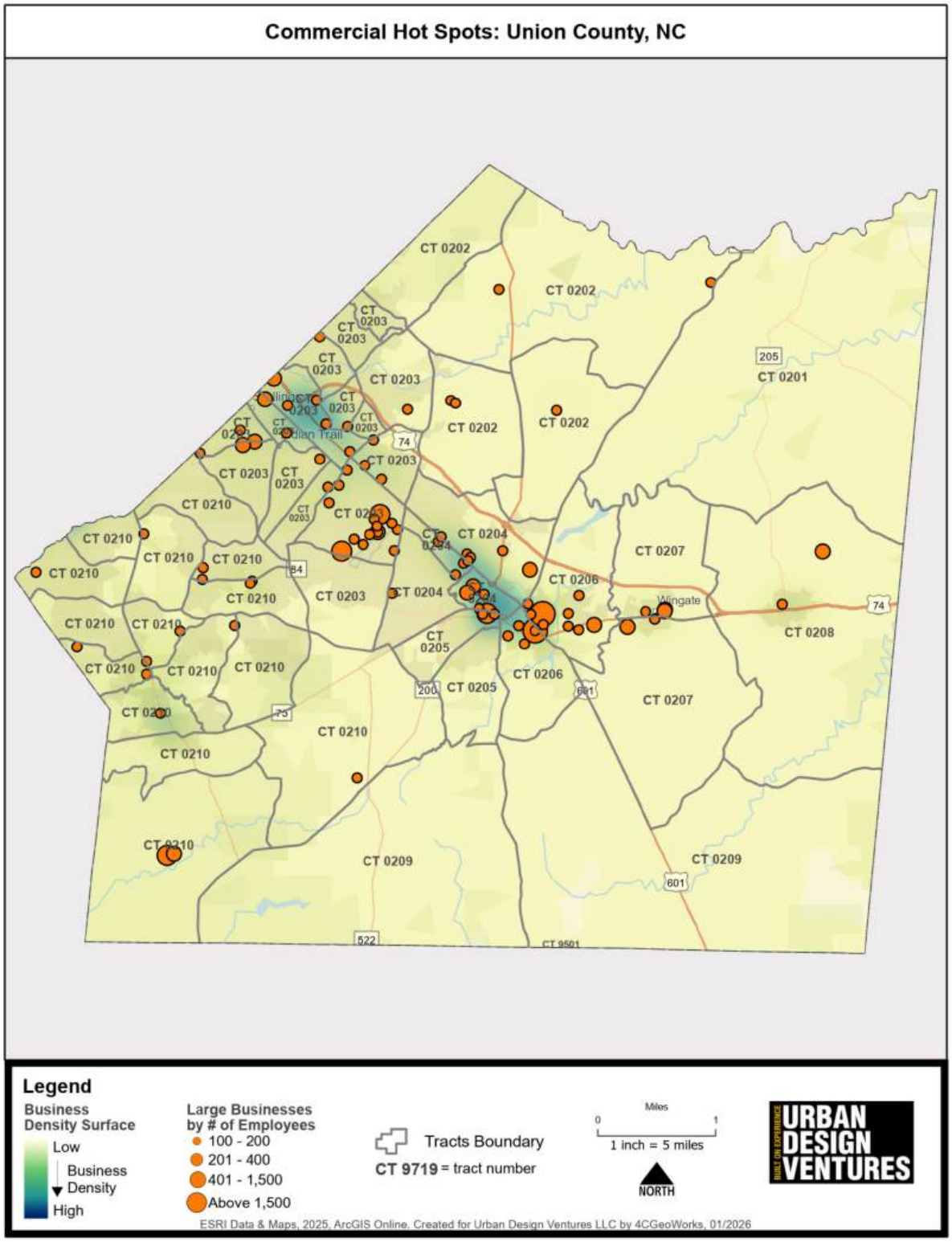
Percent Vacant Housing Units by Block Group



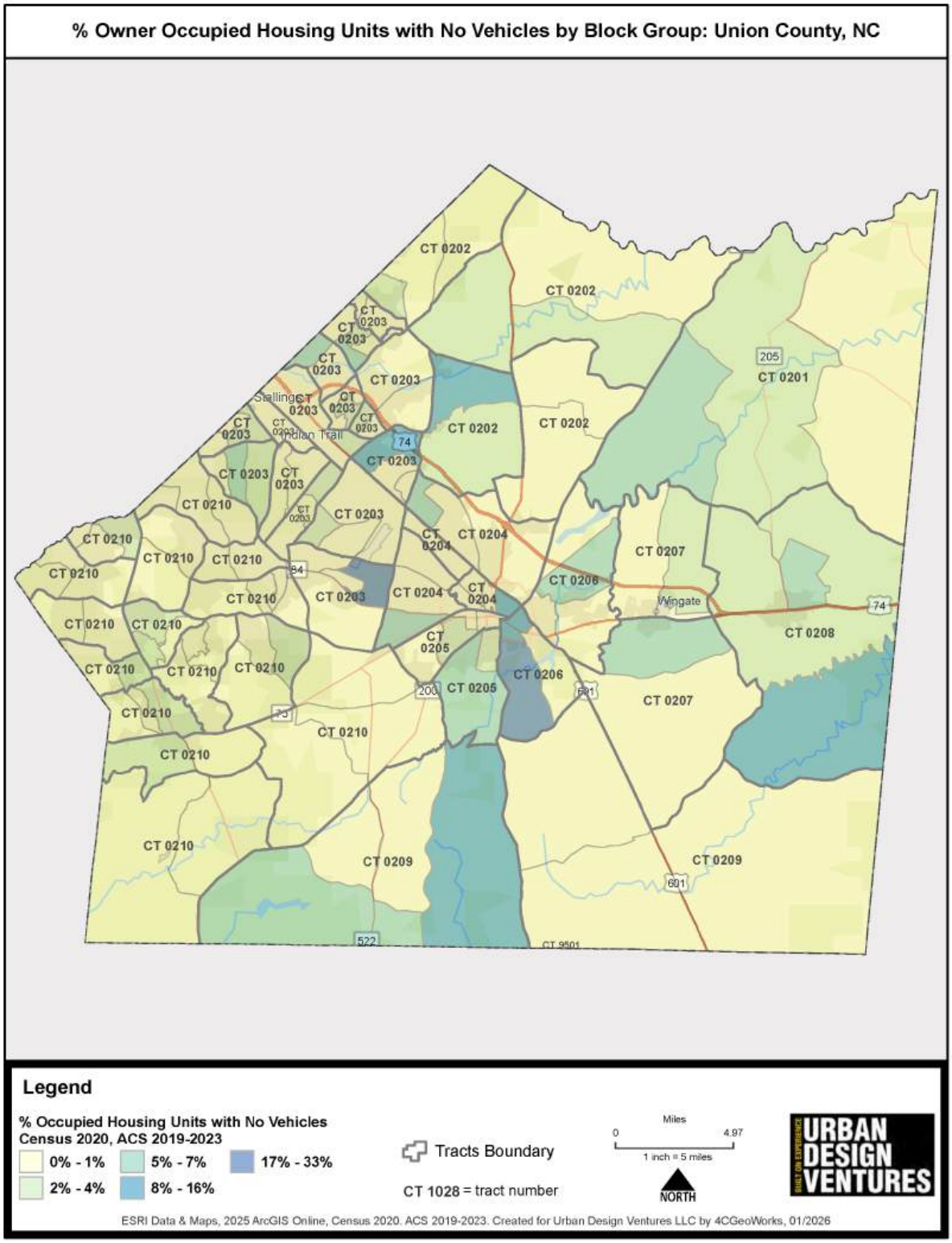
Low-Moderate Income Percentage by Block Group



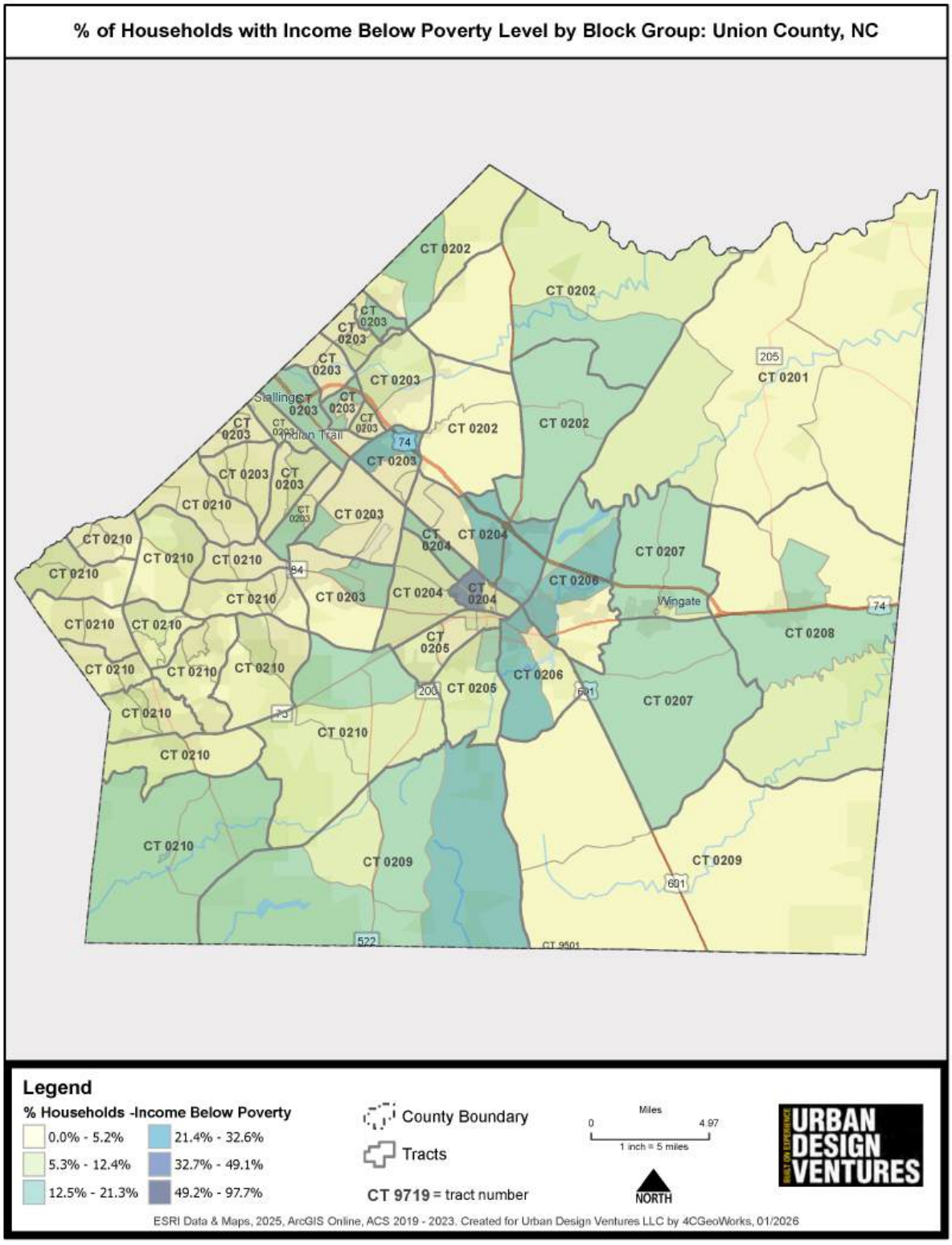
Low/Moderate Income with Minority Percentage by Block Group



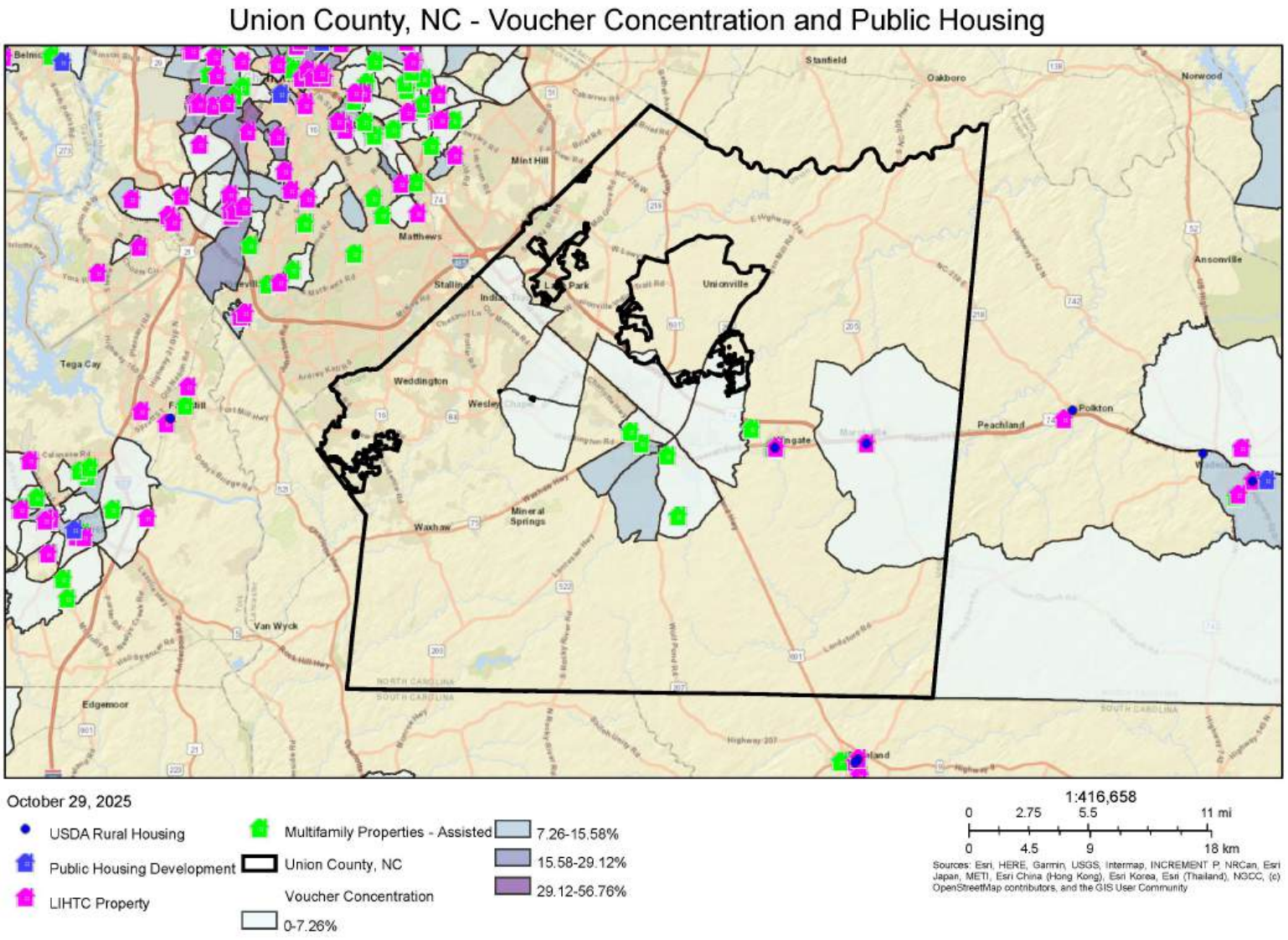
Commercial Hot Spots



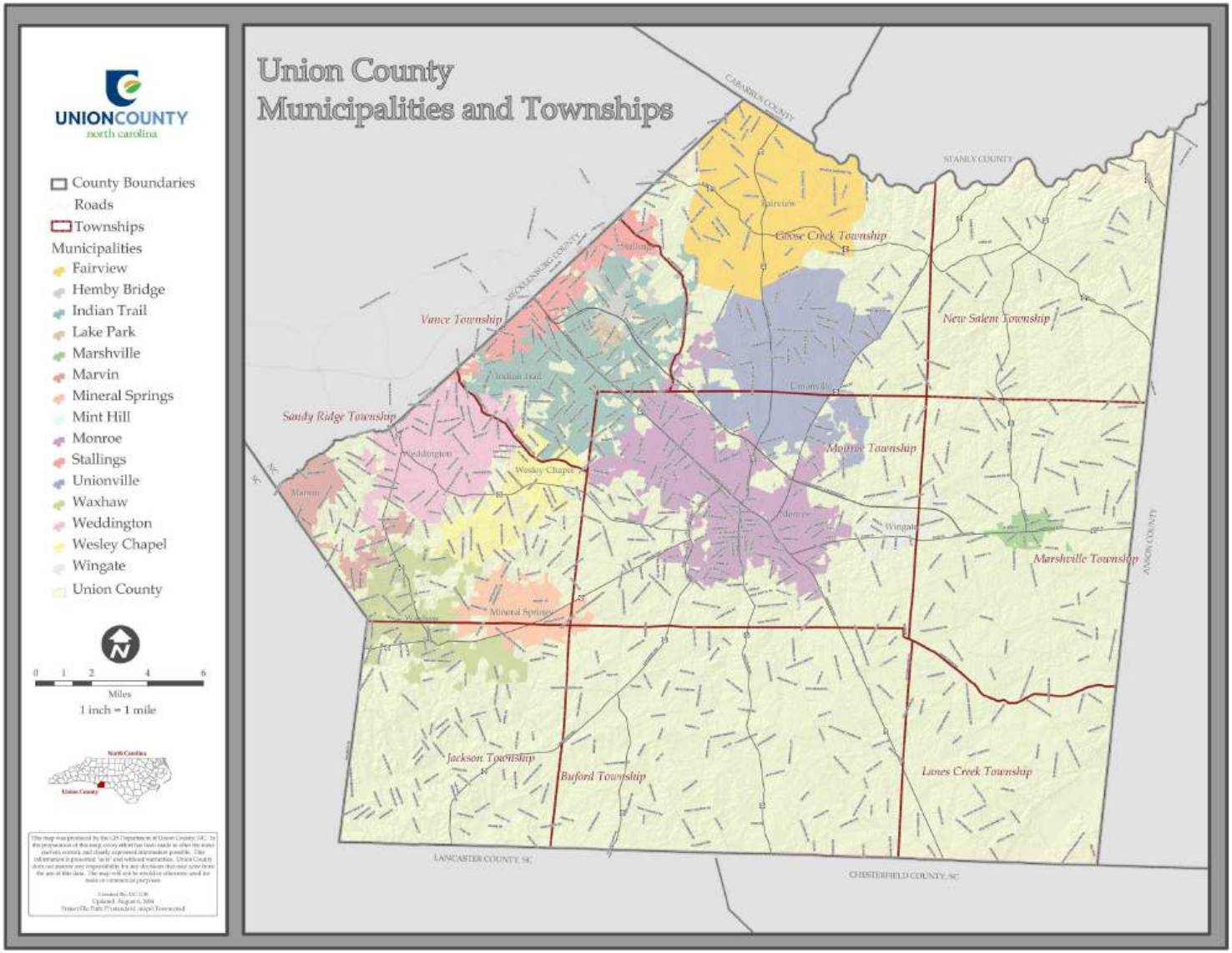
Percent Owner-Occupied Housing Units with No Vehicles by Block Group



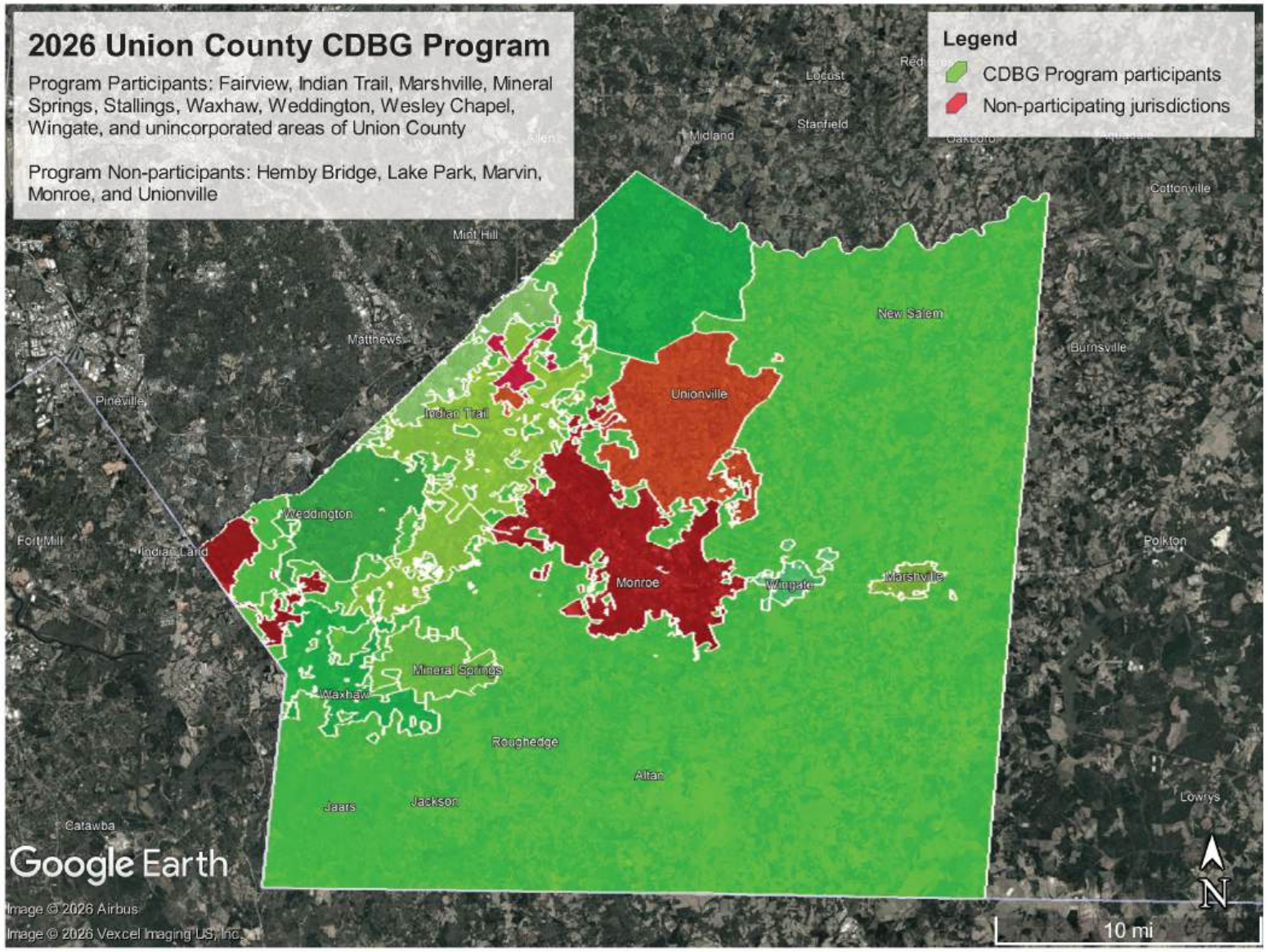
Percent of Households with Income Below the Poverty Level by Block Group



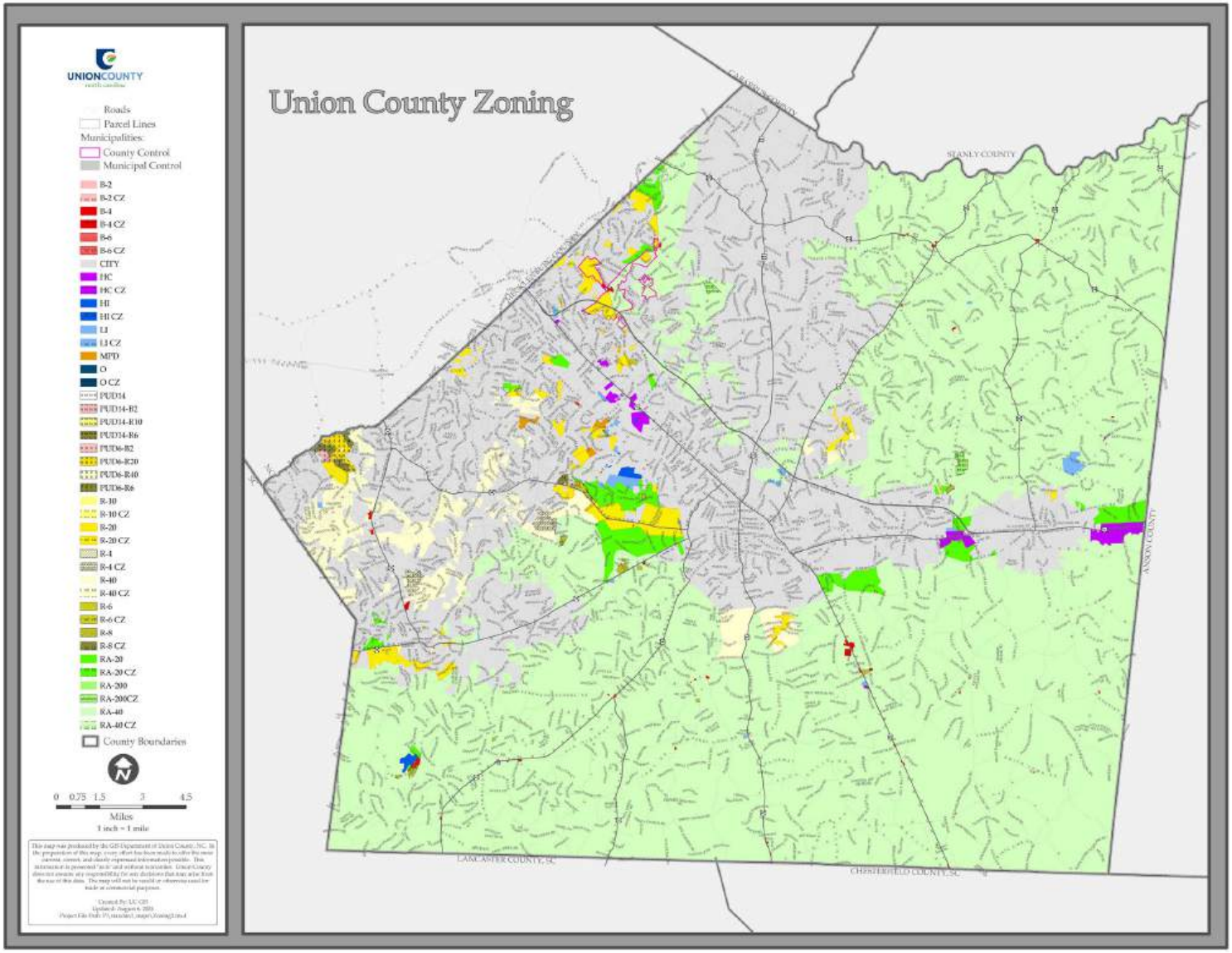
Voucher Concentration by Census Tract and Public Housing Developments



Union County Municipalities and Townships (current as of August 6, 2024)



Union County CDBG Program Participating Jurisdictions (as of FY 2026)



Union County Zoning Map (current as of August 6, 2024)

2. Summary of the objectives and outcomes identified in the Plan Needs Assessment Overview

Union County's Consolidated Plan outlines goals and strategies that parallel the County's 2050 Comprehensive Plan. The 2050 Comprehensive Plan contains community goals, policies and strategies, that lay the foundation of principles that will allow for creating a more livable and vibrant community that will offer new employment opportunities, improved public facilities and alignment of these plans will ensure coordination of current and future municipal efforts and will allow for leveraging resources targeted towards growing Union County.

The Consolidated Plan outlines goals and strategies that will be pursued over the next five years with CDBG funds. All CDBG funded projects except for program administration and planning activities, must meet one of three HUD defined National Objectives:

- Benefit to low- and moderate-income (LMI) persons: Requires recipients to spend at least 70% of their CDBG funds to meet LMI national objective.
- Aid in the prevention or elimination of slums or blight.
- Meet urgent needs to alleviate emergency conditions.

The Consolidated Plan proposes the following six (6) strategies to address the subsequent goals to address the housing, community development and economic development needs of Union County for the period of FY 2026 through FY 2030 for the CDBG Program:

Housing Priority - (HS)

There is a need to increase the supply of affordable, decent, safe, and sanitary housing for homebuyers, owners, and renters, and to protect their housing rights.

Goals:

- **HS-1 Housing Rehabilitation** - Conserve and rehabilitate owner- and renter-occupied affordable housing units across the County by addressing code violations, necessary repairs, energy conservation, utility improvements, and accessibility for persons with disabilities.
- **HS-2 Housing Construction** - Increase the supply of decent, safe and sanitary accessible housing that is affordable to low- and moderate-income homebuyers and renters in the County by providing funds for acquisition, development fees, infrastructure improvements, construction, rehabilitation, and redevelopment of vacant land and buildings.
- **HS-3 Homeownership** - Assist low- and moderate-income homebuyers in purchasing homes through down payment and closing cost assistance and associated housing counseling.

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- **HS-4 Housing Assistance** - Provide funds for utility payments, deposits, and rental fees for low-income households who are faced with the threat of eviction or who may be at risk of becoming homeless.
- **HS-5 Fair Housing** - Continue to cooperate with housing agencies and organizations to ensure that Union County residents are aware of their legal rights and available fair housing resources.

Homeless Priority - (HO)

There is a need for services and housing opportunities for persons and families who are homeless or at risk of becoming homeless.

Goals:

- **HO-1 Housing Opportunities** - Increase housing opportunities and living conditions for persons and families who are homeless or who are at risk of becoming homeless.
- **HO-2 Support and Management Services** - Promote and assist supportive and management services for public and non-profit agencies and organizations which assist persons who are homeless or who are at risk of becoming homeless.
- **HO-3 Homelessness Prevention** - Promote and assist in anti-eviction activities and work to resolve unfair housing practices which may contribute to homelessness.
- **HO-4 Permanent Supportive Housing** - Promote and assist in the development of new permanent supportive housing opportunities for persons and families who are experiencing homelessness and who are exiting shelters and transitional housing programs.
- **HO-5 Shelter Housing** - Support and assist in the development of shelters and supportive training and educational programs for sheltered residents.

Other Special Needs Priority - (SN)

There is a need to increase housing opportunities, services, and facilities for persons with special needs.

Goals:

- **SN-1 Housing -** Increase the number of decent, safe, sound, sanitary, accessible and affordable units that are available and accessible to all sectors of the special needs populations.
- **SN-2 Accessibility -** Promote and assist in making accessibility improvements to existing housing units, including making reasonable accommodations for the physically disabled so they can continue to remain in their homes.

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- **SN-3 Social Services -** Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.
- **SN-4 Removal of Architectural Barriers -** Remove architectural barriers which restrict the mobility and access to public facilities and services for persons with physical disabilities.

Community Development Priority - (CD)

There is a need to upgrade and improve community facilities, infrastructure, and public services, in order to revitalize socially and economically distressed areas of the County and to improve the quality of life for County residents.

Goals:

- **CD-1 Community Facilities** - Improve parks and trails, recreational and community facilities, and public buildings throughout the County.
- **CD-2 Infrastructure -** Rehabilitate, reconstruct, and/or construct new public infrastructure such as roadways, sidewalks, bridges, curbs, walkways, water and sanitary sewer lines, storm water drainage, and related improvements.
- **CD-3 Public Services** - Improve and enhance public services and programs for youth, the elderly, persons with disabilities, and general social/welfare public service programs for low- and moderate-income County residents.
- **CD-4 Nutritional Services -** Promote and support food and nutrition programs to address the needs of the elderly and persons with disabilities, the unemployed, underemployed, and homeless.
- **CD-5 Public Safety** - Improve and enhance public safety and emergency response through facility improvement and new construction, purchase of equipment, crime prevention, community policing, and other related activities.
- **CD-6 Clearance/Demolition** - Remove and eliminate slum and blighting conditions through demolition of vacant, abandoned, and dilapidated structures.
- **CD-7 Transportation** - Support the expansion of public transportation and improvements to pedestrian, bicycle, and vehicular transportation routes to assist low- and moderate-income residents, the elderly, persons with disabilities, and persons with other special needs in accessing medical services, employment, childcare, training, and other essential needs and services.

Economic Development Priority - (ED)

There is a need to increase employment, workforce development, self-sufficiency, educational training, and empowerment for residents of the County.

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Goals:

- **ED-1 Employment** - Support and encourage job creation, job retention, and job training opportunities in partnership with nonprofits and educational institutions.
- **ED-2 Development** - Support business and commercial growth through expansion and development including entrepreneurship and small business development in partnership with economic development organizations.
- **ED-3 Redevelopment** - Plan and promote the development, redevelopment, and revitalization of vacant commercial and industrial sites.
- **ED-4 Financial Assistance** - Support and encourage new economic development through local, state, and Federal tax incentives and programs such as Tax Incremental Financing (TIF), Local Economic Revitalization Tax Assistance (LERTA), Enterprise Zones/Entitlement Communities, Section 108 Loan Guarantees, Economic Development Initiative (EDI) funds, Opportunity Zones, Congressionally Directed Spending, etc.

Administration, Planning, and Management Priority - (AM)

There is a need for planning, administration, management, and oversight of Federal, State, and local funded programs to address the housing, community development and economic development needs.

Goals:

- **AM-1 Overall Coordination** - Provide program management and oversight for the successful administration of Federal, State, and locally funded programs, including planning services for special studies, annual action plans, five-year consolidated plans, substantial amendments, consolidated annual performance and evaluation reports (CAPER), environmental reviews and clearances, fair housing, and compliance with all Federal, State, and local laws and regulations.

- **AM-2 Fair Housing** - Support local Fair Housing Agencies and assist in the enforcement of Fair Housing Choice violations, undertake studies and other actions to demonstrate the County's commitment to Affirmatively Further Fair Housing (AFFH).

3. Evaluation of past performance

Union County continues to have good performance with HUD. The County regularly meets the performance standards set by HUD. The County prepares its Consolidated Annual Performance Evaluation Report (CAPER) and submits it within ninety (90) days after the start of the subsequent program year. Copies of each CAPER are available for review at the Union County Budget & Grants Management Department, 500 N. Main Street, Monroe, North Carolina 28112.

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The FY 2024 CAPER, which was the fourth CAPER for the FY 2021-2025 Five-Year Consolidated Plan, was submitted to HUD on December 17, 2025. In the FY 2024 CAPER, Union County expended 100% of its CDBG funds to benefit low- and moderate-income persons, which exceeds the statutory minimum of 70%. The County expended 10.67% of its funds on public services, which exceeds the statutory maximum of 15%. The County expended 9.63% of its funds on General Administration and Planning, which is below the statutory maximum of 20%. The County was not yet in compliance with the required 1.5 drawdown ratio, having an adjusted drawdown ratio for its FY 2024 allocation of 1.51 as of January 28, 2026. It intends to continue drawing down FY 2024 and prior year funds to meet the drawdown ratio.

4. Summary of citizen participation process and consultation process

The County followed its Citizen Participation Plan in its preparation of the Consolidated Plan. The County held its needs hearing for community input on Wednesday, January 21, 2026, at 5:30 PM EST. This provided residents, agencies and organizations an opportunity to discuss the County's CDBG Programs and to provide suggestions for the FY 2026-2030 Consolidated Plan.

The County's Budget and Grants Management Department maintains a contact list for the CDBG Program and sends out copies of public hearings notices and meetings concerning the Program. Notices are sent to all known agencies and individuals who have an interest or have participated in previous programs and activities.

A "Draft" FY 2026-2030 Five-Year Consolidated Plan and FY 2026 Annual Action Plan were placed on public display for review by the general public as well as agencies and organizations in the community. A newspaper notice announcing that these documents were on public display was published in "The Enquirer Journal", the local newspaper of general circulation. The "Draft" Five-Year Consolidated Plan and Annual Action Plan were on public display at the following locations:

- **Union County Government Center:** Budget & Grants Management Department, 500 N. Main Street, Monroe, NC 28112
- **Online** at https://www.unioncountync.gov/

A resident survey was made available in English-language and Spanish-language editions between December 15, 2025, and February 14, 2026. The electronic version was available on the County's website while the hard copy was available from the Budget & Grants Management Department upon request. The results of the survey were used to assist in determining goals and outcomes. An analysis and description of the citizen participation process is contained in PR-15 Citizen Participation.

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5. Summary of public comments

Union County held its First Public Hearing on Wednesday, January 21, 2026, at 5:30 PM, at the Union County Government Center Board Room, 500 N. Main Street, Monroe, NC 28112. Comments received at the First Public Hearing are included in the attachments section of the Plan.

The FY 2026-2030 Five-Year Consolidated Plan and FY 2026 Annual Action Plan were on public display from Thursday, April 30, 2026 through Friday, May 29, 2026. A Second Public Hearing was held on Wednesday, May 20, 2026 at 5:30 PM, at the Union County Government Center Board Room, 500 N. Main Street, Monroe, NC 28112. Comments received at the Second Public Hearing and during the display period are included in the attachments section of the Plan.

6. Summary of comments or views not accepted and the reasons for not accepting them

All comments and suggestions received to date have been accepted and incorporated into the planning document.

7. Summary

The goals of the Consolidated Plan are to provide a "Road Map" for the use of CDBG funding which will improve the living conditions of all residents in Union County, create a suitable and sustainable living environment, and address the housing and community development needs of the County's residents.

The Five-Year Consolidated Planning process requires that the County prepare in a single document its priorities and goals to address, establish and maintain:

- Housing needs;
- A suitable living environment; and
- Economic opportunities for every resident.

The County will use the Consolidated Plan's goals to allocate CDBG funds over the next five (5) years and to provide direction to its strategic partners, participating agencies, and stakeholder organizations to address the housing and community development needs of the low- and moderate-income residents of Union County. HUD will evaluate the County's performance based on the goals established in the Five-Year Consolidated Plan.

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8. Budget

During the FY 2026 Program Year, Union County anticipates that it will receive $843,937.00 in CDBG funds.

Union County proposes to undertake the following activities with the FY 2026 CDBG funds:

#	CDBG Project Name	
1.	Administration & Planning	$42,196.00
2.	CSUC - Community Meals & Pantry Program	$34,000.00
3.	Council on Aging - In-Home Assistance for Seniors	$42,590.00
4.	Common Heart - Economic Empowerment Program	$25,000.00
5.	Common Heart - Cupboard Ally Delivery Program	$25,000.00
6.	Infrastructure and Improvement - Park Projects	$337,576.00
7.	Habitat for Humanity - Individual Home Repair	$337,575.00
	Total CDBG Expenditure	**$843,937.00**

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The Process

PR-05 Lead & Responsible Agencies 24 CFR 91.200(b)

1. Describe agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

Agency Role	Name	Department/Agency
CDBG Administrator	Union County	Budget & Grants Management Department

Table 1 - Responsible Agencies

Narrative

The County's Budget & Grants Management Department administers the CDBG program. As such, the Department prepares the Five-Year Consolidated Plan, Annual Action Plans, Environmental Review Records (ERRs), and Consolidated Annual Performance Evaluation Reports (CAPERs). The Department also conducts monitoring, processing of payment requests, contracting, and program oversight on a day-to-day basis. Additionally, the County has retained a private planning consulting firm which is available to assist the County as needed.

Consolidated Plan Public Contact Information

Ms. Monica Culbreath
Grants Specialist
Union County Budget & Grants Management Department
500 N. Main St., Monroe, NC 28112
Phone: (704) 283-3580
Email: monica.culbreath@unioncountync.gov
Website: https://www.unioncountync.gov

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PR-10 Consultation - 91.100, 91.110, 91.200(b), 91.300(b), 91.215(l) and 91.315(l)

1. Introduction

While preparing the FY 2026-2030 Consolidated Plan and FY 2026 Annual Action, the County consulted with the Monroe Housing Authority, the Community Shelter of Union County, social services agencies, housing providers, and members of the North Carolina Balance of State Continuum of Care. Surveys were created for stakeholders and residents to complete which identified needs, system gaps, and goals for the next five years. Input from the meetings and surveys were used to develop priorities, goals and strategies for the Five-Year Plan.

Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(l)).

Union County works with the following agencies to enhance coordination:

- **Monroe Housing Authority** - The County remains abreast of Monroe Housing Authority (MHA) activities, and County residents are appointed to the MHA Board of Commissioners by the Mayor of Monroe. MHA administers Section 8 Vouchers in the County and County. Additionally, MHA's nonprofit affiliate Community Advancement & Redevelopment Enterprises Inc. (CARE) operates four Project-Based Voucher (PBV) housing developments.
- **Community Shelter of Union County** - The County and the Community Shelter coordinate their efforts to ensure homeless persons have access to food and shelter. The County also provides Federal and local funds to the Community Shelter for operation and expansion.
- **Social Services Agencies** - The County provides funds to improve services for low- and moderate-income persons.
- **Housing Providers** - The County provides funds to rehabilitate and develop affordable housing and to provide housing options for low- and moderate-income households.

As part of the annual CDBG application process, local agencies and organizations are invited to submit proposals for CDBG funds for eligible activities. These groups participate in the planning process by attending the public hearings, participating in informational meetings, and completing survey forms.

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Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness

Region 5 (the Piedmont Region) of the North Carolina Balance of State Continuum of Care encompasses Cabarrus, Davidson, Rowan, Stanly, and Union Counties. The regional lead agency is Partners Health Management, and the Community Shelter of Union County is the lead local Coordinating Agency for Union County. The County coordinates activities with the CoC and supports its applications for funding, and the Community Shelter was consulted to gather information and data on the County's Continuum of Care efforts. With County support, the CoC addresses homelessness through providing housing and supportive services for homeless persons in Union County.

Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards and evaluate outcomes, and develop funding, policies and procedures for the administration of HMIS

Not applicable. The County currently does not receive ESG funding. The Union County Community Shelter is a direct recipient of ESG funds.

The Community Shelter of Union County and Turning Point, Inc. establish their own service delivery schedules. They do participate in regularly scheduled Thrive! Union meetings to collaborate with other social service agencies and organizations. Beyond the shelters, members of Thrive! Union include Common Heart, the Community Shelter of Union County, the Union County Department of Human Services, Union County Community Action, Partners Health Management, Our Future in UNiSON, Monroe-Union County Community Development Corporation, Boys & Girls Clubs of Greater Charlotte, Health Quest Pharmacy, South Piedmont Community College, the City of Monroe, the Kaizen Foundation of North Carolina, and Atrium Health. The monthly meetings coordinate activities, promote cooperation in service delivery, and review data collected related to the homeless and at-risk populations served and any potential unmet needs. They use the time to learn about programs that may be useful in the community and advocate for and take positions on affordable housing proposals at the state and local level.

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2. Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies and other entities

1.	**Agency/Group/Organization**	**Union County Budget & Grants Management Department**
	Agency/Group/Organization Type	Other government - County Planning organization Civic Leaders Grantee Department
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Non-Homeless Special Needs HOPWA Strategy Market Analysis Economic Development Lead-based Paint Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	The Department of Budget & Grants Management is the Administrator for the County's CDBG entitlement funds and has drafted the FY 2026-2030 Five-Year Comprehensive Plan and FY 2026 Annual Action Plan.
2.	**Agency/Group/Organization**	**Union County Manager's Office**
	Agency/Group/Organization Type	Other government - County Civic Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County. The County Manager's Office sets priorities for how Union County will use its CDBG funding.

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3.	**Agency/Group/Organization**	**Union County Human Services**
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Health Services-Employment Service-Fair Housing Services - Victims Health Agency Child Welfare Agency Other government – County Planning organization
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs HOPWA Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
4.	**Agency/Group/Organization**	**Union County Building Code Enforcement**
	Agency/Group/Organization Type	Services-Housing Service-Fair Housing Agency - Management of Public Land or Water Resources Other government-County
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Lead-based Paint Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what	Consulted to ascertain needs and priorities within Union County.

	are the anticipated outcomes of the consultation or areas for improved coordination?	
5.	**Agency/Group/Organization**	**Union County Communications**
	Agency/Group/Organization Type	Services-Victims Agency-Emergency Management Other government-County
	What section of the Plan was addressed by Consultation?	Homelessness Strategy Non-Homeless Special Needs Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
6.	**Agency/Group/Organization**	**Union County Fire Marshal's Office**
	Agency/Group/Organization Type	Services - Housing Services-Elderly Persons Services-Persons with Disabilities Services-Victims Agency-Emergency Management Other government-County
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Market Analysis Economic Development Lead-based Paint Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
7.	**Agency/Group/Organization**	**Monroe Housing Authority (MHA) and Community Advancement and Redevelopment Enterprise (CARE)**
	Agency/Group/Organization Type	Housing PHA

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		Services-Housing Services-Homeless Services-Fair Housing Other government - Local
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homeless Needs - Chronically Homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth HOPWA Strategy Market Analysis Economic Development Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County. The Monroe Housing Authority is the Section 8 Housing Choice Voucher (HCV) provider for the City of Monroe and Union County. Its nonprofit partner, Community Advancement and Redevelopment Enterprise (CARE) operates the four Project-Based Voucher (PBV) developments within the County.
8.	**Agency/Group/Organization**	**Community Shelter of Union County**
	Agency/Group/Organization Type	Continuum of Care Services-Housing Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims of Domestic Violence Services-homeless Services-Health Services - Victims Regional organization
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy

		Non-Homeless Special Needs HOPWA Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County. Community Shelter of Union County is the local emergency shelter provider and representative to the NC-503 Balance of State Continuum of Care.
9.	**Agency/Group/Organization**	**Council on Aging of Union County**
	Agency/Group/Organization Type	Services-Housing Services-Elderly Persons Services-Persons with Disabilities Regional organization Civic leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homeless Needs - Chronically homeless Homelessness Needs - Veterans Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
10.	**Agency/Group/Organization**	**Food for Families**
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Persons with Disabilities Regional organization
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Strategy

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		Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
11.	**Agency/Group/Organization**	**Healthy Union Advisory Committee**
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims of Domestic Violence Services-Homeless Services-Health Services - Victims Regional organization Civic Leaders
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs HOPWA Strategy Lead-based Paint Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
12.	**Agency/Group/Organization**	**Union County Health Services**
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons

		Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims of Domestic Violence Services-Homeless Services-Health Services-Education Services-Victims Health Agency Child Welfare Agency Publicly Funded Institution/System of Care Other government - County
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs HOPWA Strategy Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
13.	**Agency/Group/Organization**	**Common Heart**
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Persons with Disabilities Regional organization
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy

	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
14.	**Agency/Group/Organization**	**Town of Marshville**
	Agency/Group/Organization Type	Services - Victims Agency - Managing Flood Prone Areas Agency - Management of Public Land and Water Resources Agency - Emergency Management Other government - Local Civic Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
15.	**Agency/Group/Organization**	**Village of Marvin**
	Agency/Group/Organization Type	Agency - Managing Flood Prone Areas Agency - Management of Public Land and Water Resources Other government - Local Civic Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy

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	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
16.	**Agency/Group/Organization**	**Town of Waxhaw**
	Agency/Group/Organization Type	Agency - Managing Flood Prone Areas Agency - Management of Public Land and Water Resources Other government - Local Civic Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
17.	**Agency/Group/Organization**	**Monroe-Union County Community Development Corporation**
	Agency/Group/Organization Type	Services - Housing Service-Fair Housing Regional organization Planning organization Business and Civic Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of	Consulted to ascertain needs and priorities within Union County. MUCCDC provides Fair Housing services and housing counseling & assistance to County residents.

	the consultation or areas for improved coordination?	
18.	**Agency/Group/Organization**	**Union County Library**
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Homeless Services-Education Services-Narrowing the Digital Divide Regional organization
	What section of the Plan was addressed by Consultation?	Non-Homeless Special Needs Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
19.	**Agency/Group/Organization**	**Daymark Recovery Services**
	Agency/Group/Organization Type	Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Health Services-Employment Services - Victims Regional organization
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homelessness Strategy Non-Homeless Special Needs Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
20.	**Agency/Group/Organization**	**Turning Point, Inc.**
	Agency/Group/Organization Type	Services-Housing Services-Children

		Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims of Domestic Violence Services-Homeless Services-Victims Publicly Funded Institution/System of Care Regional organization
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
21.	**Agency/Group/Organization**	**Union-Anson County Habitat for Humanity**
	Agency/Group/Organization Type	Housing Services-Housing Services-Elderly Persons Services-Persons with Disabilities Services-Homeless Service-Fair Housing Regional organization Civic Leaders
	What section of the Plan was addressed by Consultation?	Housing Needs Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy

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	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
22.	**Agency/Group/Organization**	**Union County Chamber of Commerce**
	Agency/Group/Organization Type	Services-Education Services-Employment Regional organization Business Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
23.	**Agency/Group/Organization**	**Union County Association of REALTORS**
	Agency/Group/Organization Type	Housing Regional organization Planning organization Business Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
	Agency/Group/Organization	**South Piedmont Community College**

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24.	**Agency/Group/Organization Type**	Services-Education Services-Employment Services - Narrowing the Digital Divide Regional organization Business and Civic Leaders Major Employer
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Non-Homeless Special Needs Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
25.	**Agency/Group/Organization**	**North Carolina Coalition to End Homelessness (NCCEH)**
	Agency/Group/Organization Type	Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims of Domestic Violence Services-homeless Services-Fair Housing Services - Victims Regional organization
	What section of the Plan was addressed by Consultation?	Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of	The North Carolina Coalition to End Homelessness was contacted to obtain information about homelessness and shelter space in Union County. NCCEH manages the NC-503 Balance of State Continuum of Care.

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	the consultation or areas for improved coordination?	
26.	**Agency/Group/Organization**	**Union County NAACP**
	Agency/Group/Organization Type	Services-Education Regional organization Civic Leaders
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Consulted to ascertain needs and priorities within Union County.
27.	**Agency/Group/Organization**	**Charter Communications/Spectrum**
	Agency/Group/Organization Type	Services-Broadband Internet Service Providers Services-Narrowing the Digital Divide Business Leaders Major Employer
	What section of the Plan was addressed by Consultation?	Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Spectrum plans were examined to determine the availability and affordability of broadband internet service in Union County.
28.	**Agency/Group/Organization**	**Comcast/Xfinity**
	Agency/Group/Organization Type	Services-Broadband Internet Service Providers Services-Narrowing the Digital Divide Business Leaders Major Employer

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	What section of the Plan was addressed by Consultation?	Market Analysis Economic Development Anti-poverty Strategy Community Development Strategy
	How was the Agency / Group / Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Xfinity plans were examined to determine the availability and affordability of broadband internet service in Union County.

Identify any Agency Types not consulted and provide rationale for not consulting

All known agency types were consulted and their input was incorporated in this plan.

Other local/regional/state/federal planning efforts considered when preparing the Plan

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Citizen Participation Plan	Union County, NC	The Citizen Participation Plan was followed in completing the Five-Year Consolidated Plan and Annual Action Plan.
Union County 2050 Comprehensive Plan	Union County, NC	The goals of the Comprehensive Plan and Five-Year Consolidated Plan are complementary.
Continuum of Care	Community Shelter of Union County	The NC-503 Balance of State Continuum of Care is the primary provider of housing and supportive services for persons who are unhoused or at risk of homelessness in Union County. The goals of the County and the Continuum of Care are complementary.
Monroe Housing Authority Annual Plan and Family Self-Sufficiency Plan	Monroe Housing Authority	The Monroe Housing Authority provides Section 8 Housing Choice Vouchers and Project-Based Vouchers to eligible County residents. The goals of the County and the Housing Authority are complementary.

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Prosperity for All: Greater Charlotte Region Comprehensive Economic Development Strategy 2023-2028	Centralina Regional Council	They are incorporated into the Five-Year Consolidated Plan and the Annual Action Plan.
Cabarrus Stanly Union Regional Hazard Mitigation Plan	Cabarrus Stanly Union Regional Hazard Mitigation Planning Committee	Regulations and guidelines for disaster hazard preparation and mitigation are incorporated into the Five-Year Consolidated Plan and the Annual Action Plan.
National Risk Index	US Federal Emergency Management Agency	Data regarding potential disaster risks are incorporated into the Five-Year Consolidated Plan and the Annual Action Plan.
North Carolina Environmental Public Health Tracking Program	North Carolina Department of Health and Human Services, Division of Public Health	Data regarding childhood lead levels, rates of HIV/AIDS and other social determinants of health are incorporated into the Five-Year Consolidated Plan and the Annual Action Plan.
North Carolina Broadband Indices	North Carolina Division of Broadband and Digital Opportunity	Data regarding the availability and adoption rates of broadband internet in Union County are incorporated into the Five-Year Consolidated Plan and the Annual Action Plan.

Table 2 - Other local/regional/federal planning efforts

Describe cooperation and coordination with other public entities, including the State and any adjacent units of general local government, in the implementation of the Consolidated Plan (91.215(l))

The Union County Budget & Grants Management Department administers the CDBG program and any potential additional HUD grant programs. Its staff coordinates efforts with other County departments such as Building Code Enforcement, Community Support & Outreach, Economic Development, Parks and Recreation, Planning & Development, Public Health and Social Services.

The County Manager promotes policies as approved by the Board of County Commissioners, and delegates their enforcement or completion to departments and agencies as appropriate. The Manager also works with the mayors, managers and councils of communities within the County to address projects and activities that affect multiple municipal governments.

Additionally, Union County and its partner Union-Anson County Habitat for Humanity follow guidelines published by the North Carolina Department of Health and Human Services (DHHS) to assist with lead-based paint hazard reduction in units being renovated through the County's

Homeownership programs. The State does not identify specific units where lead-based paint is present; those units are identified through the homeownership program inspection process. The DHHS Division of Public Health provides data on the incidence of childhood lead poisoning and its likely sources.

Many agencies and organizations serving Union County are based outside of the County and serve other counties in the Charlotte metropolitan area or greater North Carolina. These groups were contacted for their opinions and for data that pertains to local, regional, and statewide needs.

The members of Region 5 of the North Carolina Balance of State (BOS) Continuum of Care (CoC) were invited to roundtable discussions to determine the needs of the homeless, chronically homeless, and those at-risk of becoming homeless. Many of these partners provided comments on the Consolidated Plan in either discussions or surveys.

Narrative (optional):

The County and its municipalities work to address needs that are common to both levels of government and to coordinate and implement projects that have common goals. Communication is maintained between County and municipal departments to ensure that all jurisdictions are able to jointly address needs.

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PR-15 Citizen Participation - 91.105, 91.115, 91.200(c) and 91.300(c)

1. Summary of citizen participation process/Efforts made to broaden citizen participation

The FY 2026-2030 Consolidated Plan and FY 2026 Annual Action Plan used the following actions encourage citizen participation: requests for funding were accepted from agencies/organizations; interviews and roundtable discussions were held with stakeholders; a needs public hearing was held to determine priorities; and a public hearing was held to gather public comments on the draft plan while on public display. The County posted a resident survey on the County's website in both English and Spanish and received 166 completed surveys in English, none in Spanish. The survey results and comments are included in the Attachment Section of this document. The County used the input gathered through the citizen participation and stakeholder participation processes to develop a plan to serve the low- and moderate-income population of Union County.

Summarize citizen participation process and how it impacted goal setting

In accordance with its Citizen Participation Plan, Union County advertised and held a public hearing on the community and social needs within the County. It also held a public hearing to receive comments on the draft FY 2026-2030 Five-Year Consolidated Plan and FY 2026 Annual Action plan. Both hearings were advertised on the County's website and in the local newspaper, the "Journal-Enquirer". A draft of the consolidated plan was available on the County's website at https://www.unioncountync.gov/ and copies of the plan were available at the Union County Government Center for resident comments. Online resident surveys were also available in English at https://www.surveymonkey.com/r/UnionCo2026-2030Resident and in Spanish at https://es.surveymonkey.com/r/UnionCo2026-2030ResidentESP.

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Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/ attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
1.	Newspaper Ad for First Public Hearing and Applications	-Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies & Organizations	None.	None.	None.	Not applicable.
2.	First Public Hearing	-Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing	Union County held its first Public Hearing on January 21, 2026. See public hearing sign-in sheets in the Exhibits section of the Consolidated Plan.	See public hearing comments in Exhibits section of the Consolidated Plan.	All comments were accepted and incorporated into the Consolidated Plan.	Not applicable.
3.	Internet Outreach	-Minorities -Non-English Speaking: Spanish -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing	Union County received 166 responses through online surveys in English and in Spanish.	See comments in Exhibits section of the Consolidated Plan.	All comments were accepted and incorporated into the Consolidated Plan.	www.surveymonkey.com/r/UnionCo2026-2030Resident es.surveymonkey.com/r/UnionCo2026-2030ResidentESP

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4.	Stakeholder Meetings	-Agencies & Organizations	Between December 11, 2025 and January 30, 2026, Union County held 8 virtual meetings and phone calls with government, nonprofit, and for-profit entities that serve Union County.	See comments in Exhibits section of the Consolidated Plan.	All comments were accepted and incorporated into the Consolidated Plan.	Not applicable.
5.	Stakeholder Surveys	-Agencies & Organizations	Union County received 14 stakeholder surveys from government, nonprofit, and for-profit entities that serve Union County.	See comments in Exhibits section of the Consolidated Plan.	All comments were accepted and incorporated into the Consolidated Plan.	www.surveymonkey.com/r/UnionCo2026-2030Agency www.surveymonkey.com/r/UnionCo2026-2030Govt
6.	Newspaper Ad for Second Public Hearing and Display	-Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies & Organizations	None.	None.	None.	Not applicable.

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7.	Second Public Hearing	-Minorities -Persons with disabilities -Non-targeted / broad community -Residents of Public and Assisted Housing	Union County held its second Public Hearing on May 20, 2026. See public hearing sign-in sheets in the Exhibits section of the Consolidated Plan.	See public hearing comments in Exhibits section of the Consolidated Plan.	All comments were accepted and incorporated into the Consolidated Plan.	Not applicable.

Table 3 - Citizen Participation Outreach

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Needs Assessment

NA-05 Overview

Needs Assessment Overview

To examine its housing needs, Union County used data from the 2017-2021 HUD Comprehensive Housing Affordability Strategy (CHAS), the 2019-2023 American Community Survey (ACS) Five-Year Estimates, and the 2020 U.S. Census. This data was the most current information available to assess needs related to housing, homelessness, special needs, social services, and economic development. Union County is represented by the Union County Community Shelter to Region 5 of the NC-503 North Carolina Balance of State Continuum of Care (CoC), and the County used data for the development of the homeless needs section from the CoC. Additional needs for Union County were obtained from roundtable discussions and interviews with various social service agencies, housing providers, County staff, and survey responses.

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NA-10 Housing Needs Assessment - 24 CFR 91.205 (a, b, c)

Summary of Housing Needs

Based on a comparison between the 2018 base year and 2023 population estimates, Union County had an 8.1% increase in its population and a 9.4% increase in the number of households. This reflects a decrease in household size from 3.02 persons to 2.98 persons per household.

Over the same time period the median income increased by $23,846 or 31.6%. However, this increase largely benefited households that were already at or above 100% of median family income. While low- and moderate-income households did also see increases in household income, social service providers have noted that the number of persons seeking financial and food assistance has continued to rise.

Demographics	Base Year: 2018	Most Recent Year: 2023	% Change
Population	226,694	244,975	8.06%
Households	75,165	82,231	9.40%
Median Income	$75,397	$99,243	31.63%

Table 4 - Housing Needs Assessment Demographics

Data Source: 2014-2018 and 2019-2023 ACS tables DP02 and DP03

Number of Households Table

	0-30% HAMFI	>30-50% HAMFI	>50-80% HAMFI	>80-100% HAMFI	>100% HAMFI
Total Households	6,025	8,060	12,090	8,180	44,125
Small Family Households	1,660	2,700	4,520	4,235	25,845
Large Family Households	540	1,205	1,705	795	5,265
Household contains at least one person 62-74 years of age	1,545	2,120	3,060	2,220	8,620
Household contains at least one person age 75 or older	1,219	1,350	1,430	710	2,580
Households with one or more children 6 years old or younger	850	1,809	2,135	1,789	7,460

Table 5 - Total Households Table

Data Source: 2017-2021 CHAS tables 5, 7, and 13

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Housing Needs Summary Tables

1. Housing Problems (Households with one of the listed needs)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Substandard Housing - Lacking complete plumbing or kitchen facilities	45	25	55	0	**190**	110	0	0	15	**155**
Severely Overcrowded - With >1.5 people per room (and complete kitchen and plumbing)	30	15	10	0	**115**	0	0	60	35	**160**
Overcrowded - With >1-1.5 people per room (and none of the above problems)	160	370	185	95	**830**	15	145	280	110	**825**
Housing cost burden greater than 50% of income (and none of the above problems)	1,210	455	195	0	**1,865**	1,915	950	640	165	**3,830**
Housing cost burden between 30% and 50% of income (and none of the above problems)	260	1,260	685	145	**2,425**	620	2,015	2,270	1,025	**7,355**
Zero/negative Income (and none of the above problems)	210	0	0	0	**210**	470	0	0	0	**470**

Table 6 - Housing Problems Table

Data Source: 2017-2021 CHAS table 3

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2. Housing Problems 2 (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Having 1 or more of four severe housing problems	1,445	865	445	95	**3,000**	2,040	1,095	980	325	**4,965**
Having none of four severe housing problems OR household has negative income, but none of the other severe housing problems	715	1,875	2,600	1,645	**10,680**	1,825	4,220	8,060	6,110	**59,830**

Table 7 - Housing Problems 2

Data Source: 2017-2021 CHAS table 2

3. Cost Burden > 30% of Household income

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Elderly Family	35	65	60	**180**	140	705	335	**1,570**
Small Family	100	585	280	**1,090**	70	475	925	**2,930**
Large Family	55	240	65	**360**	45	500	230	**970**
Elderly Non-Family	95	180	4	**304**	325	255	245	**1,075**
Other	30	360	275	**720**	45	180	540	**940**
Total need by income	**315**	**1,430**	**684**	**2,654**	**625**	**2,115**	**2,275**	**7,485**

Table 8 - Cost Burden > 30%

Data Source: 2017-2021 CHAS table 7

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4. Cost Burden > 50% of Household income

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Elderly Family	105	10	0	**115**	210	190	125	**590**
Small Family	410	225	105	**740**	755	410	330	**1,695**
Large Family	220	50	25	**295**	130	75	60	**275**
Elderly Non-Family	285	30	40	**355**	560	155	80	**795**
Other	360	160	40	**560**	275	125	45	**495**
Total need by income	**1,380**	**475**	**210**	**2,065**	**1,930**	**955**	**640**	**3,850**

Table 9 - Cost Burden > 50%

Data Source: 2017-2021 CHAS table 7

5. Crowding (More than 1 and less than or equal to 1.5 persons per total rooms)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Single family households	120	330	110	55	**640**	15	110	245	100	**685**
Multiple, unrelated family households	35	35	75	40	**185**	0	35	40	10	**140**
Other, non-family households	0	0	0	0	**0**	0	0	0	0	**0**
Total need by income	**160**	**370**	**185**	**95**	**830**	**15**	**145**	**280**	**110**	**825**

Table 10 - Crowding Information - 1/2

Data Source: 2017-2021 CHAS table 10

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
Households with Children Present	500	859	595	**3,028**	350	950	1,540	**11,015**

Table 11 - Crowding Information - 2/2

Describe the number and type of single-person households in need of housing assistance.

According to the 2019-2023 American Community Survey, there were 82,231 households in Union County. Of those households, 65,269 (79.4%) were family households. There were 13,925 (16.9%) single-person households in the County and 5,919 households (7.2%) were single-person households age 65 or older.

Based on the ACS estimates, 42.5% of all County residents living alone are seniors, an increase of nearly 9% since 2018. The County encourages them to age in place in their existing dwellings, but it is presumed that additional accommodation and supportive services will be necessary to allow this portion of the County's population to age in place. The County will need to assist in obtaining funding and collaborating with housing service and elderly support agencies to provide programs, activities and accommodations for its elderly population.

Estimate the number and type of families in need of housing assistance who are disabled or victims of domestic violence, dating violence, sexual assault and stalking.

Disabled:

According to the 2019-2023 ACS estimates, there are 22,541 Union County residents who have a disability, 9.2% of the County's total civilian noninstitutionalized population of 243,794. This is an indicator of the need for accessible and affordable housing for disabled persons, who are mainly low- and moderate-income and whose housing is increasingly outstripping their fixed financial resources.

A breakdown of disability prevalence in Union County is as follows. NOTE: a person may have more than one disability (such as a self-care difficulty and an ambulatory difficulty) so the following numbers are not cumulative:

- **Hearing difficulty:** 6,522 persons, 2.7% of population
- **Vision difficulty:** 3,643 persons, 1.5% of population
- **Cognitive difficulty:** 8,424 persons, 3.7% of population
- **Ambulatory difficulty:** 10,711 persons, 4.6% of population
- **Self-care difficulty:** 4,309 persons, 1.9% of population
- **Independent living difficulty**: 7,601 persons, 4.2% of population

Victims of Domestic Violence, Dating Violence, Sexual Assault, and Stalking:

The Union County Sheriff's Office tracks different types of crime committed at the County level. However, these numbers are not geographically inclusive as they do not include incidents investigated by municipal agencies in Union County (including the Monroe, Waxhaw, Stallings, Wingate and Marshville Police Departments). They also do not include all categories of crime such as sexual assault and some juvenile offenses. The North Carolina State Bureau of Investigation recorded 365 aggravated assaults of which 107 were cleared, 88 rapes (32 cleared), and 5 murders (3 cleared) in 2024 in Union County.

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NCSBI also tracks domestic violence-related homicides statewide and by County. Statewide in 2024, there were 155 victims of domestic violence-related homicide (a 14.8% increase from the 135 individual victims reported for calendar year 2025), and 155 offenders in 2024 which was a 21.1% increase over 2023. The number of statewide domestic violence-related homicides spiked during the COVID Pandemic, rising from 108 in 2019 to 134 in 2020, 148 in 2021, down to 115 in 2022 but back up to 135 in 2023 and 155 in 2024. The statistics for 2025 are not yet available. For victims, 60.6% were female and 39.4% were male; 28.4% of offenders were female and 71.6% were male. Nearly half of the victim-offender relationships (47.1%) were a dating relationship, followed in prevalence by persons of the opposite sex who lived together (34.8%), a parent/guardian-children relationship (30.3%), current or former household members (28.4%), current or former spouses (16.8%), and finally persons who have a child in common (11.6%). Note that one victim/offender pair could be represented in more than one relationship group, and that a single offense can involve more than one relationship code. While there were no domestic violence-related homicides in Union County during 2024, there were five (5) such homicides in the prior five years.

Turning Point, Inc. is the designated domestic violence shelter and provider for Union County, NC. Services include a 24/7 crisis line, safe shelter, victim and court advocacy, case management, children's programs, parenting classes, individual and group counseling, and financial or relocation assistance for survivors who cannot safely remain in their homes or community. The organization also participates in the NC Domestic Violence Intervention Programs (DVIP), formerly known as abuser treatment programs (ATP) or batterer intervention programs (BIP). These are designed to aid in eliminating domestic violence by providing services to offenders to hold them accountable, promote safety and justice for victims and children, and work to bring about social change necessary to end battering and all forms of domestic violence.

According to data made available by the NC Division for Women & Youth, between July 2023 and June 2024 Turning Point, Inc., served 1,260 clients. This included 1,401 DV victims, 98 child witnesses to abuse, 5 stalking victims, 8 victims of human trafficking, 34 rape victims, 7 adult survivors of childhood sexual abuse, 5 child sex offenders, and 10 other victims. (These numbers may reflect multiple visits to Turning Point by the same client, or multiple reasons for the same visit.)

Approximately 0.5% of Union County's 244,975 residents were clients of Turning Point between July 2023 and June 2024. However, domestic violence and sexual assault tend to be underreported compared to other criminal activity.

What are the most common housing problems?

The greatest housing need in Union County is the need for affordable housing, particularly affordable rental housing units. The 2017-2021 CHAS data (based on the 2017-2021 ACS estimates) indicates that the County has a total of 78,475 occupied housing units of which 64,795 (82.6%) are owner-occupied and 13,680 (17.4%) are renter occupied. At all income levels, renter-occupied households were much more likely than owner-occupied households to experience a housing cost burden. A total of 2,654 renter-occupied households (19.4% of all renter-occupied households) had a housing cost burden greater than 30% but less than or equal to 50% of household income; the number of cost burdened owner-occupied

households was higher at 7,485 but the percentage is lower at 11.6%. Additionally, 2,065 renter-occupied households (15.1%) had a housing cost burden of greater than 50% of household income while only 3,850 owner-occupied households (5.9%) were severely cost burdened.

These statistics are supported by consultations, interviews and surveys which indicate that the expanding supply of housing in Union County does not include sufficient housing for low- and moderate-income persons. In particular, there is an insufficient supply of affordable, decent, safe, sanitary, accessible and sound housing for elderly persons and persons with disabilities, working low- and moderate-income families, and other low-, very low-, and extremely low-income households. The County intends to address this imbalance by continuing its home renovation and sewer/well repair program, as well as working with nonprofit and for-profit developers to ensure that future housing construction includes units that are accessible to low- and moderate-income householders.

Are any populations/household types more affected than others by these problems?

Low- and moderate-income households are heavily affected by current market conditions in both the rental and for-sale markets. Existing residents have had to compete for housing with those moving from Charlotte and Mecklenburg County. They have been further affected by higher property tax due to higher property values as well as higher utility costs and the higher nationwide proportional increase of housing costs to wages. Many Union County residents commute to better-paid jobs nearer to Charlotte, but for less-affluent households without reliable transport these jobs are essentially inaccessible. Low- and moderate-income persons are also more likely to have debt loads and poor credit scores, which can effectively screen them out of housing that would otherwise be affordable to them.

Consultations, interviews and surveys have identified a lack of affordable, decent, safe, sanitary, accessible and sound housing for elderly and disabled persons in the County. These populations are usually on fixed or limited incomes such as retirement income, Social Security, or Supplemental Security Disability. Those who are homeowners often cannot afford accessibility improvements, basic repairs, or even utility payments. Meanwhile, renters on a fixed income are unable to afford increases in monthly rent or utilities, which often forces them into housing that is below code standards or is not accessible. The least expensive housing units in Union County include manufactured housing (mobile homes), older rural single-family housing, and old multifamily housing developments. These are generally the least accessible to those with disabilities and are most likely to have housing problems.

Another group adversely affected by the lack of affordable housing are the homeless and persons at risk of becoming homeless, including victims of domestic violence and persons aging out of foster care. The limited supply of affordable housing causes undue housing burden on underemployed persons and families and can force them out of permanent housing. Financial burden can also exacerbate interpersonal issues leading to domestic violence and substance abuse, both major risk factors for homelessness that can also cause children to enter the foster care system. There are only two shelters within the County (the Community Shelter of Union County and Turning Point, Inc.), which report having few to no available beds.

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Due to high demand and low supply of only 172 Project-Based Voucher (PBV) units, 33 Rental Assistance Demonstration (RAD) PBV units, 325 Tenant-Based Vouchers (TBV) and 39 Mainstream Vouchers for households with a disabled individual, the Monroe Housing Authority has had to close its waiting lists for both Section 8 Housing Choice Vouchers and CARE Project-Based Voucher housing. Additionally, landlords have the right to refuse tenants who wish to use Housing Choice Vouchers for payment. This places additional limitations on housing that can be considered affordable.

Describe the characteristics and needs of low-income individuals and families with children (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered 91.205(c)/91.305(c)). Also discuss the needs of formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance

Households below the poverty level are more likely to be at risk of homelessness, become homeless in temporary shelter, or become literally unhoused. The most at-risk households are single-earner family households, women-led households with no spouse present and children under 18 (of which 36.2% are below the poverty level), and households with one or more elderly or disabled person(s). These residents often have difficulty finding or maintaining sufficient employment and may not have emergency savings, which easily leads to severe housing cost burdens, housing instability and homelessness.

These households and individuals are aided through a variety of services provided by agencies and nonprofits such as food pantries, thrift stores, mental and physical healthcare providers, job counseling services, immigration and language assistance, and clothing/household goods donations to households. The CoC ensures that aid organizations maintain relationships with previously assisted households to ensure they do not experience a return to homelessness. At the Monroe Housing Authority/CARE Serenity Place PBV development, the Union County Human Services' Community Support and Outreach Division provides a senior nutrition program

Union County is not a Federal Entitlement through the Emergency Solutions Grant (ESG) Program. To fill this gap and provide funding for homelessness services and prevention for non-entitlement communities, the State of North Carolina Department of Health and Human Services administers the NC Emergency Solutions Grant Program. The program funds Street Outreach Services, Emergency Shelter, Homelessness Prevention Services, Rapid Rehousing Services, and Data Collection via NC HMIS. ESG funds are used to support the state's twelve CoCs in their efforts to assist people who are homeless or at risk of homelessness. This includes housing stabilization services such as rapid re-housing and homelessness prevention, operating costs and client services at emergency shelters, and outreach services for people who are unsheltered. Some funding can also be used for CoC support, including HMIS and administrative costs.

Specific needs of low-income persons who are at risk of becoming homeless or are living in shelters include food assistance, financial coaching, transportation, affordable childcare that is accessible and reliable, and

sustainable wage employment and /or training opportunities. Several local social service agencies provide food and clothing through food pantries, food kitchens and thrift stores. Transportation and job training opportunities are limited, and funding is needed to offer those types of assistance programs.

Both the Community Shelter of Union County and Turning Point maintain records in HMIS and monitor and track assisted households. The Community Shelter of Union County indicates that approximately 83% of clients who participate in their rehousing program do not return to homelessness.

If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates:

When conducting client intake, CoC providers identify those at imminent risk of homelessness by means of need and type of assistance being sought. The CoC defines imminent risk using the definitions set forth by HUD. HUD's criteria for defining the risk of homelessness is an individual or family who:

- Has an annual income below 30% of median family income for the area; AND
- Does not have sufficient resources or support networks immediately available to prevent them from moving to an emergency shelter or another place defined in Category 1 of the "homeless" definition; AND
- Meets one of the following conditions:
    1. Has moved because of economic reasons 2 or more times during the 60 days immediately preceding the application for assistance; OR
    2. Is living in the home of another because of economic hardship; OR
    3. Has been notified that their right to occupy their current housing or living situation will be terminated within 21 days after the date of application for assistance; OR
    4. Lives in a hotel or motel and the cost is not paid for by charitable organizations or by Federal, State, or local government programs for low-income individuals; OR
    5. Lives in an SRO or efficiency apartment unit in which there reside more than 2 persons or lives in a larger housing unit in which there reside more than one and a half persons per room; OR
    6. Is exiting a publicly funded institution or system of care; OR
    7. Otherwise lives in housing that has characteristics associated with instability and an increased risk of homelessness, as identified in the recipient's approved Consolidated Plan.

Specify particular housing characteristics that have been linked with instability and an increased risk of homelessness

Housing characteristics linked with instability and increased risk of homelessness include single earner households with children and household with a disabled member who is unable to obtain sustainable employment. Unexpected crises can contribute to destabilizing low- and moderate-income households.

Many low- and moderate-income families experience high rent burdens, become unstable, and face homelessness with a first-time crises or loss of income. The lack of supportive housing and the cost overburden of housing as it relates to income/employment are major housing issues linked with instability and an increased risk of homelessness.

Reasons homelessness occurs often fall within the following categories:

- Eviction within two weeks from a private dwelling
- Sudden loss of income
- Extremely low income (30% below income limits)
- Overcrowding (doubling up)
- Experienced three or more moves in the past year
- Have children under the age of two
- Single parent
- Young head of household (under 25)
- Have an eviction notice from public or assisted housing
- Experienced domestic violence within the past 12 months
- History of non-compliance (missed appointments with case workers, etc.)
- Released from jail, or prison within the past 18 months
- Mental health and or substance abuse issues
- Involvement with child welfare, including foster care
- Severe housing burden (greater than 50% of income for housing costs)

The availability and associated cost of purchasing and maintaining affordable, decent, safe, sanitary, accessible and sound housing in the County creates housing instability for lower income households. Many households' live paycheck to paycheck and are cost burdened, paying more than 30% of their monthly income for housing.

Other factors of instability and an increased risk of homelessness include individuals being discharged from foster care, health care facilities, mental health treatment facilities, correctional facilities, and substance abuse treatment. These populations cannot achieve self-sufficiency as it takes time to secure steady employment and stable housing. Victims of domestic violence that leave abusive situations are also at risk. Individuals and households with special needs, including the elderly, frail elderly, those with a disability, and those who are in treatment for substance abuse or HIV/AIDS are also at risk. Medical bills, finding accessible housing is a challenge particularly for families and individuals living on fixed incomes. Lack of affordable childcare also adds to the burden of the at-risk population. Almost every new entry-level job pays more than Federal minimum wage, some significantly more, but struggling households still have to consider whether the new job pays enough for their family to cover lost government benefits and the cost of childcare. It is often more financially sound for a parent or guardian in a low-income family to leave the full-time labor force, provide one's own childcare, and retain benefits.

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It is common for low- and moderate-income persons to have limited financial literacy, which places them at increased risk of homelessness. Once these persons enter the homebuyer market, they often fall victim to predatory lending, “land contract” or “rent-to-own” schemes, or substandard housing conditions from not completing a home inspection. Along with normal housing costs and maintenance, these issues can lead homeowners to quickly become cost burdened by 30% or more of their monthly income, or even severely cost burdened by 50% or more of their monthly income.

Discussion

Union County's population has increased over the last five years, from 226,694 to 244,975 persons (8.1%). The number of households also increased during the same period, from 76,165 to 82,231 households (9.4%). The number of households that have one or more housing problems is growing (mostly attributed to housing cost burden) and an increasing number of households are at risk of becoming homeless.

Housing developers in Union County have focused on creating large amounts of single-family detached housing for the County’s growing population. The highest growth is in the upper income categories, and the market has provided for-sale housing aimed at households well above 100% of the Area Median Income of the Charlotte, NC MSA. This creates a shortage of affordable, decent, safe, sanitary, accessible and sound housing that is affordable to low-income persons, who generally are unable to obtain mortgages and can’t afford to purchase housing. In consultation with stakeholders and residents, lower-income working families, seniors, and persons with disabilities are particularly in need of affordable, decent and accessible housing. The County has determined that there is a need for affordable, decent, safe, sanitary, accessible and sound housing for low- and moderate-income homebuyers and renters.

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NA-15 Disproportionately Greater Need: Housing Problems - 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

During the preparation of this Five-Year Consolidated Plan, the County investigated whether any racial or ethnic group is disproportionately affected by housing problems. Disproportionately greater need is defined as a subgroup having at least 10 percentage points higher frequency of a particular problem than the percentage of persons as a whole in that group. Data detailing information by racial group and Hispanic origin has been compiled from the 2017-2021 CHAS data.

HUD considers the following four factors to determine if any racial or ethnic group is disproportionately affected by housing problems: lack of complete kitchen facilities, lack of completed plumbing facilities, overcrowding, and housing cost burden. Lack of kitchen facilities means a dwelling does not have the necessary equipment to prepare meals; lack of complete plumbing facilities means a dwelling does not have the necessary equipment for conducting routine hygiene needs; severe overcrowding reflects a dwelling that has more than one person per room on average; and severe cost burden reflects a household that pays more than 30% of its income in housing expenses such as rent, utilities, or mortgage payments.

The following tables describe the prevalence of housing problems by area median income.

0%-30% of Area Median Income

Housing Problems	One or more of four housing problems	None of the four housing problems OR household has no / negative income but none of the other housing problems
Jurisdiction as a whole	4,365	1,660
White	2,625	1,180
Black / African American	1,110	290
Asian	125	10
American Indian, Alaska Native	20	0
Pacific Islander	0	0
Hispanic	390	80

Table 12 - Disproportionally Greater Need 0 - 30% AMI

Data Source: 2017-2021 CHAS

**The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%*

30%-50% of Area Median Income

Housing Problems	One or more of four housing problems	None of the four housing problems OR household has no / negative income but none of the other housing problems
Jurisdiction as a whole	5,235	2,825
White	2,675	2,045
Black / African American	970	375
Asian	105	40
American Indian, Alaska Native	0	0
Pacific Islander	0	0
Hispanic	1,275	285

Table 13 - Disproportionally Greater Need 30 - 50% AMI

Data Source: 2017-2021 CHAS

**The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%*

50%-80% of Area Median Income

Housing Problems	One or more of four housing problems	None of the four housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	4,380	7,710
White	3,045	5,965
Black / African American	660	855
Asian	54	65
American Indian, Alaska Native	0	4
Pacific Islander	0	0
Hispanic	390	660

Table 14 - Disproportionally Greater Need 50 - 80% AMI

Data Source: 2017-2021 CHAS

**The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%*

80%-100% of Area Median Income

Housing Problems	One or more of four housing problems	None of the four housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	1,590	6,590
White	1,205	4,885
Black / African American	210	810
Asian	35	30
American Indian, Alaska Native	0	50
Pacific Islander	0	0
Hispanic	140	590

Table 15 - Disproportionally Greater Need 80 - 100% AMI

Data Source: 2017-2021 CHAS

**The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%*

Greater than 100% of Area Median Income

Housing Problems	One or more of four housing problems	None of the four housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	2,175	41,950
White	1,605	33,825
Black / African American	140	3,510
Asian	155	1,595
American Indian, Alaska Native	0	65
Pacific Islander	0	10
Hispanic	215	2,205

Table 16 - Disproportionally Greater Need 80 - 100% AMI

Data Source: 2017-2021 CHAS

**The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%*

Discussion

According to the 2017-2021 CHAS data, Union County had 78,475 total households. Of these, there were 59,055 White households (75.3% of the total), 8,930 Black/African American households (11.4%), 2,214 Asian households (2.8%), 139 American Indian and Alaska Native households (0.2%), 10 Native Hawaiian and Other Pacific Islander households (0.0%) and 6,230 Hispanic households (7.9%). The following groups were disproportionately affected:

0-30% AMI: Overall, 72.4% of households had at least one housing problem. In terms of disproportionately greater need, 92.6% of Asian households, 100% of American Indian or Alaska Native households, and 83.0% of Hispanic households had at least one housing problem.

30-50% AMI: Overall, 65.0% of households had at least one housing problem. In terms of disproportionately greater need, 81.7% of Hispanic households had at least one housing problem.

50-80% AMI: Overall, 36.2% of households had at least one housing problem. There were no disproportionately affected racial or ethnic cohorts.

80-100% AMI: Overall, 19.4% of households had at least one housing problem. In terms of disproportionately greater need, 53.8% of Asian households had at least one housing problem.

Greater than 100% AMI: Overall, 4.9% of households had at least one housing problem. There were no disproportionately affected racial or ethnic cohorts.

DRAFT

NA-20 Disproportionately Greater Need: Severe Housing Problems - 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

During the preparation of this Five-Year Consolidated Plan, the County investigated whether any racial or ethnic group is disproportionately affected by housing problems. Disproportionately greater need is defined as a subgroup having at least 10 percentage points higher frequency of a particular problem than the percentage of persons as a whole in that group. Data detailing information by racial group and Hispanic origin has been compiled from the 2017-2021 CHAS data.

HUD considers the following four factors to determine if any racial or ethnic group is disproportionately affected by severe housing problems: lack of complete kitchen facilities, lack of completed plumbing facilities, severe overcrowding, and severe housing cost burden. Lack of complete kitchen facilities means a dwelling does not have the necessary equipment to prepare meals; lack of complete plumbing facilities means a dwelling does not have the necessary equipment for conducting routine hygiene needs; severe overcrowding reflects a dwelling that has more than 1.5 persons per room on average; and severe cost burden reflects a household that pays more than 50% of its income in housing expenses such as rent, utilities, or mortgage payments.

The following tables describe the prevalence of severe housing problems by area median income.

0%-30% of Area Median Income

Severe Housing Problems	One or more of four severe housing problems	None of the four severe housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	3,485	2,540
White	2,050	1,750
Black / African American	880	515
Asian	95	45
American Indian, Alaska Native	20	0
Pacific Islander	0	0
Hispanic	375	95

Table 17 - Severe Housing Problems 0 - 30% AMI

Data Source: 2017-2021 CHAS

**The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%*

30%-50% of Area Median Income

Severe Housing Problems	One or more of four severe housing problems	None of the four severe housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	1,960	6,095
White	900	3,820
Black / African American	270	1,075
Asian	35	110
American Indian, Alaska Native	0	0
Pacific Islander	0	0
Hispanic	585	975

Table 18 - Severe Housing Problems 30 - 50% AMI

Data Source: 2017-2021 CHAS

**The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%*

50%-80% of Area Median Income

Severe Housing Problems	One or more of four severe housing problems	None of the four severe housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	1,425	10,660
White	925	8,080
Black / African American	205	1,305
Asian	40	75
American Indian, Alaska Native	0	4
Pacific Islander	0	0
Hispanic	205	845

Table 19 - Severe Housing Problems 50 - 80% AMI

Data Source: 2017-2021 CHAS

**The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%*

80%-100% of Area Median Income

Severe Housing Problems	One or more of four severe housing problems	None of the four severe housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	420	7,755
White	290	5,800
Black / African American	15	1,000
Asian	30	35
American Indian, Alaska Native	0	50
Pacific Islander	0	0
Hispanic	85	640

Table 20 - Severe Housing Problems 80 - 100% AMI

Data Source: 2017-2021 CHAS

**The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%*

Greater Than 100% of Area Median Income

Severe Housing Problems	One or more of four severe housing problems	None of the four severe housing problems OR household has no/negative income but none of the other housing problems
Jurisdiction as a whole	670	43,450
White	460	34,970
Black / African American	15	3,635
Asian	35	1,720
American Indian, Alaska Native	0	65
Pacific Islander	0	10
Hispanic	130	2,290

Table 21 - Severe Housing Problems 80 - 100% AMI

Data Source: 2017-2021 CHAS

**The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%*

Discussion

According to the 2017-2021 CHAS data, Union County had 78,475 total households. Of these, there were 59,055 White households (75.3% of the total), 8,930 Black/African American households (11.4%), 2,214 Asian households (2.8%), 139 American Indian and Alaska Native households (0.2%), 10 Native Hawaiian and Other Pacific Islander households (0.0%) and 6,230 Hispanic households (7.9%). The following groups were disproportionately affected:

0-30% AMI: Overall, 57.8% of households had at least one severe housing problem. In terms of disproportionately greater need, 67.9% of Asian households, 100% of American Indian or Alaska Native households, and 79.8% of Hispanic households had at least one severe housing problem.

30-50% AMI: Overall, 24.3% of households had at least one severe housing problem. In terms of disproportionately greater need, 37.5% of Hispanic households had at least one severe housing problem.

50-80% AMI: Overall, 11.8% of households had at least one severe housing problem. In terms of disproportionately greater need, 34.8% of Asian households had at least one severe housing problem.

80-100% AMI: Overall, 5.1% of households had at least one severe housing problem. In terms of disproportionately greater need, 46.2% of Asian households had at least one severe housing problem.

Greater than 100% AMI: Overall, 1.5% of households had at least one severe housing problem. There were no disproportionately affected racial or ethnic cohorts.

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NA-25 Disproportionately Greater Need: Housing Cost Burdens - 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction:

During the preparation of this Five-Year Consolidated Plan, the County investigated whether any racial or ethnic group is disproportionately affected by housing problems. Disproportionately greater need is defined as a subgroup having at least 10 percentage points higher frequency of a particular problem than the percentage of persons as a whole in that group. Data detailing information by racial group and Hispanic origin has been compiled from the 2017-2021 CHAS data.

Union County has experienced a continued residential building boom over the last three decades. However, most of these residences are single-family detached houses aimed toward middle- and upper-income, often costing more than half a million dollars per property. There is a much lower percentage of affordable, decent, safe, sanitary, accessible and sound housing available for low- and moderate-income households. A large number of low-income households in the County pay more than 30% of their total household income for housing, and a significant number pay more than 50% of their household income.

HUD considers a household to be cost burdened if it is paying more than 30% of income toward rent/mortgage and utilities. Cost burden affects not just low- and moderate-income households but all households who pay more than 30% of their income toward housing costs. Households paying more than 50% of income toward rent/mortgage and utilities are considered severely cost burdened.

Housing Cost Burden

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)
Jurisdiction as a whole	61,735	10,140	5,925	690
White	48,330	6,570	3,740	420
Black / African American	5,915	1,765	1,105	135
Asian	1,750	255	205	10
American Indian, Alaska Native	120	0	20	0
Pacific Islander	10	0	0	0
Hispanic	4,340	1,265	585	40

Table 22 - Greater Need: Housing Cost Burdens AMI

Data Source: 2017-2021 CHAS

Discussion:

Cost Burden: Overall, 12.9% of all households within Union County were cost burdened by 30-50% of their household income. These households are at risk for homelessness if they encounter a housing problem or loss of income. In terms of racial and ethnic groups, 11.1% of White households are cost burdened, as are 19.8% of Black/African American households, 11.5% of Asian households, 0.0% of American Indian and Alaska Native Households, 0.0% of Native Hawaiian or Pacific Islander households, and 20.3% of Hispanic households. There were no disproportionately burdened racial or ethnic cohorts.

Severe Cost Burden: There were 7.6% of households within Union County that were severely cost burdened by more than 50% of their household income. These households are at very high risk of homelessness if they encounter a minor housing problem, a small loss of income, or any financial or personal difficulties. Low- and moderate-income renter households are at the highest risk. In terms of racial and ethnic groups, 1.9% of White households are severely cost burdened, as are 12.4% of Black/African American households, 9.2% of Asian households, 14.3% of American Indian and Alaska Native Households, 0.0% of Native Hawaiian or Pacific Islander households, and 9.4% of Hispanic households. There were no disproportionately burdened racial or ethnic cohorts.

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NA-30 Disproportionately Greater Need: Discussion - 91.205(b)(2)

Are there any Income categories in which a racial or ethnic group has disproportionately greater need than the needs of that income category as a whole?

According to the 2017-2021 CHAS data, Union County had 78,475 total households. Of these, there were 59,055 White households (75.3% of the total), 8,930 Black/African American households (11.4%), 2,214 Asian households (2.8%), 139 American Indian and Alaska Native households (0.2%), 10 Native Hawaiian and Other Pacific Islander households (0.0%) and 6,230 Hispanic households (7.9%).

Housing Problems: The following racial and ethnic cohorts were disproportionately affected by housing problems:

- 0-30% AMI range: Asian, American Indian and Native Alaskan, and Hispanic households;
- 30-50% AMI range: Hispanic households; and
- 80-100% AMI range: Asian households.

Severe Housing Problems: The following racial and ethnic cohorts were disproportionately affected by severe housing problems:

- 0-30% AMI range: Asian, American Indian and Native Alaskan, and Hispanic households;
- 30-50% AMI range: Hispanic households;
- 50-80% AMI range: Asian households; and
- 80-100% AMI range: Asian households.

Cost Burden (30-50% of household income): There were no disproportionately burdened racial or ethnic cohorts.

Severe Cost Burden (over 50% of household income): There were no disproportionately burdened racial or ethnic cohorts.

Of all racial and ethnic groups, Asian, American Indian and Native Alaskan, and Hispanic households are most likely to experience disproportionate levels of housing problems.

If they have needs not identified above, what are those needs?

There are no additional needs that have not been previously identified.

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Are any of those racial or ethnic groups located in specific areas or neighborhoods in your community?

According to the 2019-2023 ACS data, Union County had a minority population of 32.0% of its total population (persons who are non-White and/or Hispanic or Latino). HUD defines a Minority Neighborhood as, "A neighborhood in which the percentage of persons of a particular racial or ethnic minority is at least 20 points higher than that minority's percentage in the housing market as a whole; the neighborhood's total percentage of minority persons is at least 20 points higher than the total percentage of minorities for the housing market area as a whole; or in the case of a metropolitan area, the neighborhood's total percentage of minority persons exceeds 50 percent of its population."

According to the 50% definition, there are twenty (20) Block Groups in the County that are considered a "Minority Neighborhood:"

- Census Tract 203.05, Block Group 1: 50.19% minority
- Census Tract 203.21, Block Group 1: 78.76% minority
- Census Tract 204.01, Block Group 1: 61.60% minority
- Census Tract 204.01, Block Group 2: 52.35% minority
- Census Tract 204.06, Block Group 1: 90.10% minority
- Census Tract 204.06, Block Group 2: 94.04% minority
- Census Tract 204.06, Block Group 4: 90.63% minority
- Census Tract 205.01, Block Group 1: 91.00% minority
- Census Tract 205.01, Block Group 2: 53.69% minority
- Census Tract 205.01, Block Group 3: 56.22% minority
- Census Tract 205.02, Block Group 1: 69.02% minority
- Census Tract 206.01, Block Group 1: 97.44% minority
- Census Tract 206.01, Block Group 2: 52.42% minority
- Census Tract 206.01, Block Group 4: 86.19% minority
- Census Tract 206.02, Block Group 1: 80.87% minority
- Census Tract 206.02, Block Group 3: 63.20% minority
- Census Tract 207.01, Block Group 3: 71.12% minority
- Census Tract 207.02, Block Group 1: 56.64% minority
- Census Tract 208, Block Group 4: 68.97% minority

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The County uses the HUD definition of a low-mod area as any area with a population of low- and moderate-income residents that is equal to or greater than 51% of the entire population of the area. According to this definition, 32 of the 132 Block Groups within the County are considered low-mod areas:

- Census Tract 202.05, Block Group 2: 54.7% low-mod
- Census Tract 203.07, Block Group 1: 57.5% low-mod
- Census Tract 203.08, Block Group 4: 52.7% low-mod
- Census Tract 203.12, Block Group 1: 52.6% low-mod
- Census Tract 203.21, Block Group 1: 57.3% low-mod
- Census Tract 204.01, Block Group 2: 53.6% low-mod
- Census Tract 204.03, Block Group 1: 65.2% low-mod
- Census Tract 204.03, Block Group 3: 56.4% low-mod
- Census Tract 204.05, Block Group 1: 71.3% low-mod
- Census Tract 204.06, Block Group 1: 52.8% low-mod
- Census Tract 204.06, Block Group 2: 92.4% low-mod
- Census Tract 204.06, Block Group 3: 57.4% low-mod
- Census Tract 204.06, Block Group 4: 98.1% low-mod
- Census Tract 205.01, Block Group 1: 72.3% low-mod
- Census Tract 205.01, Block Group 2: 65.8% low-mod
- Census Tract 205.02, Block Group 1: 86.0% low-mod
- Census Tract 206.01, Block Group 1: 80.1% low-mod
- Census Tract 206.01, Block Group 4: 75.7% low-mod
- Census Tract 206.02, Block Group 1: 75.1% low-mod
- Census Tract 206.02, Block Group 3: 51.2% low-mod
- Census Tract 207.01, Block Group 1: 72.2% low-mod
- Census Tract 207.01, Block Group 2: 100% low-mod
- Census Tract 207.01, Block Group 3: 61.0% low-mod
- Census Tract 207.02, Block Group 1: 51.5% low-mod
- Census Tract 207.02, Block Group 2: 60.8% low-mod
- Census Tract 208, Block Group 2: 73.3% low-mod
- Census Tract 208, Block Group 3: 65.4% low-mod
- Census Tract 208, Block Group 4: 72.8% low-mod
- Census Tract 208, Block Group 5: 59.4% low-mod
- Census Tract 209.01, Block Group 1: 59.5% low-mod
- Census Tract 209.01, Block Group 2: 70.2% low-mod
- Census Tract 210.15, Block Group 1: 54.5% low-mod

Union County has an overall low-mod percentage of 35.09%.

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NA-35 Public Housing - 91.205(b)

Introduction

The Monroe Housing Authority (MHA) administers Section 8 Housing Choice Vouchers in Union County. Its partner nonprofit Community Advancement and Redevelopment Enterprise (CARE) operates the former MHA public housing properties as Rental Assistance Demonstration (RAD) Project-Based Voucher (PBV) residences. MHA is and will continue to be the primary resource for the County's very low-income households. As of its FY 2026 Draft Annual Plan, the Housing Authority administered 325 Tenant-Based Vouchers (TBV) and 39 Mainstream Vouchers for households with a disabled individual. CARE owns and operates units funded by 205 Project-Based Vouchers (PBV) at four properties.

The following statistics were obtained from the HUD Public & Indian Housing Information Center (PIC) and from the Monroe Housing Authority's FY 2026 Draft Annual Plan. Note: the demographic information from HUD PIC has been superseded and does not include information regarding Mainstream vouchers, but newer information is not available.

Totals in Use

Program Type									
	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project - based	Tenant - based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers in use	0	0	0	569	205	325	0	0	39
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 23 - Public Housing by Program Type

Data Source: Monroe Housing Authority

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Characteristics of Residents

	Program Type							
	Certificate	Mod-Rehab	Public Housing	Vouchers				
				Total	Project-based	Tenant-based	Special Purpose Voucher	
							Veterans Affairs Supportive Housing	Family Unification Program
Average Annual Income	0	0	0	11,619	8,937	11,619	0	0
Average length of stay	0	0	0	9	5	9	0	0
Average Household size	0	0	0	2	2	2	0	0
# Homeless at admission	0	0	0	0	0	0	0	0
# of Elderly Program Participants (>62)	0	0	0	40	46	40	0	0
# of Disabled Families	0	0	0	48	8	48	0	0
# of Families requesting accessibility features	0	0	0	283	205	283	0	0
# of HIV/AIDS program participants	0	0	0	0	0	0	0	0
# of DV victims	0	0	0	0	0	0	0	0

Table 24 - Characteristics of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

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Race of Residents

Program Type									
Race	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project-based	Tenant-based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
White	0	0	32	37	0	37	0	0	0
Black/African American	0	0	173	245	0	245	0	0	0
Asian	0	0	0	1	0	1	0	0	0
American Indian/Alaska Native	0	0	0	0	0	0	0	0	0
Pacific Islander	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 25 - Race of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Ethnicity of Residents

Program Type									
Ethnicity	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project-based	Tenant-based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled*
Hispanic	0	0	2	8	0	8	0	0	0
Not Hispanic	0	0	203	275	0	275	0	0	0
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 26 – Ethnicity of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Section 504 Needs Assessment: Describe the needs of public housing tenants and applicants on the waiting list for accessible units:

Of the 205 CARE Project-Based Voucher units, 45 are dedicated to elderly and/or disabled residents. Additionally, MHA manages 39 Mainstream vouchers which are intended for use by households with a disabled individual at a private rental unit with accessibility features suited to that individual. The MHA has a Section 504 Plan which is reviewed annually and updated as needed.

The Monroe Housing Authority generally houses applicants with disabilities in a reasonable time with units that are appropriate for the accessibility need of the household. Unit size and amenities are arranged when the applicant reaches the top of the waiting list. It does use additional preference points for elderly and disabled applicants when placing them on the waiting list. For disabled persons under age 62 seeking to use a Mainstream voucher to obtain private housing, preference is given in the following categories:

a. Transitioning out of institutional and other segregated settings
b. At serious risk of institutionalization
c. Currently experiencing homelessness
d. Previously experienced homelessness and currently a client in a permanent supportive housing or rapid rehousing facility
e. At risk of homelessness

According to the Housing Authority's Agency Plan, the housing authority is able to house applicants with disabilities in a reasonable time and has experienced no problems with finding units that fit the accessibility needs of the disabled. Applicants are asked if any member of the household requires reasonable accommodation in order to access MHA programs or CARE facilities. If accommodation is required, MHA will work with the client to meet their needs. The housing authority is not fully aware of the client's specific needs until housing is available, at which point the household in need will coordinate with MHA/CARE staff to determine what reasonable accommodation will be provided.

Most immediate needs of residents of Public Housing and Housing Choice voucher holders

The Monroe Housing Authority maintains a waiting list for Housing Choice Vouchers (HCV), and CARE maintains waiting lists for each of its four Project-Based Voucher (PBV) properties. As of January 2026 both sets of lists are closed. Additional information about the number and attributes of persons on the waiting lists was not provided by the Housing Authority.

Project-Based Voucher (PBV) housing is limited to only 205 units. Of these, only 45 units are specifically set aside for elderly and disabled persons. Likewise, there are only 325 Tenant-Based Vouchers (TBV) and 39 Mainstream Vouchers specifically set aside for disabled persons.

The size and wait time of the Section 8 waitlist is based on the need for additional vouchers, landlords willing to accept Housing Choice Vouchers in lieu of employment income, and affordable quality housing

units. While there are many private housing units being constructed in Union County to add to the housing supply, these are primarily intended to be executive-level owner-occupied single-family homes rather than workforce housing that is more accessible financially. The County's increasing population and inflationary pressures have pushed median rental payments above the HUD Fair Market Rents for Union County, NC. This also allows landlords and management companies to require that tenants have a relatively high credit score and have employment income of at least three times greater than the monthly rent; some landlords specifically advertise that they will not accept housing vouchers.

How do these needs compare to the housing needs of the population at large?

Project-Based Voucher residents and Tenant-Based Voucher holders have lower overall household incomes than residents of Union County at large. They reside in CARE properties or use TBV support due to being unable to afford or obtain private market-rate properties that fit their needs. This can be caused by unemployment or underemployment, disability or old age, past convictions or evictions, or poor credit that otherwise disqualifies applicants from private housing. MHA clients are in greater need of financial assistance, case management and other social services than the overall population of the County and are at greater risk of homelessness.

Discussion

The Monroe Housing Authority works with the County to address the housing needs of residents of Union County who have low, very low or extremely low income. The County has identified the need for affordable housing that is affordable, decent, safe, sanitary, accessible and sound. There are a significant number of households in the County that are at or below 50% of AMI that have housing problems, severe housing problems and/or are housing cost burdened. The Monroe Housing Authority can provide safe, secure and decent housing for family households working toward a more stable financial situation and senior and disabled households hoping to age in place.

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NA-40 Homeless Needs Assessment - 91.205(c)

Introduction:

Union County is part of Region 5 of the NC-503 North Carolina Balance of State CoC, which is administered by the North Carolina Coalition to End Homelessness (NCCEH). Locally, the CoC's activities are administered by the Community Shelter of Union County. The County coordinates its activities with the Continuum of Care and supports applications for funding as well as working with other members through Thrive! Union to maintain its network of supportive housing and services for the homeless.

Beyond the Community Shelter, members of the CoC include the County's Human Services Department, Turning Point, Inc., social service agencies, shelter providers, and housing providers. Using the Homeless Management Information System (HMIS) as a tool to provide services to homeless individuals and families, case managers are able to help clients identify their needs and challenges and provide unduplicated assistance.

Homeless Needs Assessment

Population	Estimate the # of persons experiencing homelessness on a given night		Estimate the # experiencing homelessness each year	Estimate the # becoming homeless each year	Estimate the # exiting homelessness each year	Estimate the # of days persons experience homelessness
	Sheltered	Unsheltered				
Persons in Households with Adult(s) and Child(ren)	37	0	333	536	20	124
Persons in Households with Only Children	0	0	0	0	0	0
Persons in Households with Only Adults	73	67	464	359	52	101
Chronically Homeless Individuals	3	23	62	43	N/A	N/A
Chronically Homeless Families	0	0	42	536	N/A	N/A
Veterans	1	3	26	11	0	112
Unaccompanied Youth	7	7	33	29	3	62
Persons with HIV	0	0	0	N/A	N/A	N/A

Table 27 - Homeless Needs Assessment

Data Source Comments: North Carolina Coalition to End Homelessness (NCCEH)

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If data is not available for the categories "number of persons becoming and exiting homelessness each year," and "number of days that persons experience homelessness," describe these categories for each homeless population type (including chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth):

According to the NC-503 Point-in-Time count conducted on the night of January 29, 2025, 177 persons were experiencing homelessness in Union County. While most homeless persons in the Charlotte MSA reside in Mecklenburg County or the City of Charlotte proper, Union County does have a significant unhoused population. This consists of both transient homeless persons along the US 74 corridor (often migrant workers seeking seasonal work) and long-term residents who have insufficient housing. For transient unhoused persons in particular, it is difficult to determine accurate numbers for how many people experience homelessness, how long a person has been homeless, and how many days they experience homelessness in a year. Based on the Point in Time (PIT) Survey, the Housing Inventory Count (HIC), and interviews with stakeholders, there is a need for additional year-round shelter space throughout the County. especially for subgroups like women, families with children, persons with mental and physical health concerns, and the chronically homeless.

Four general categories of homelessness are:

Literally Homeless - Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning:

- Has a primary night-time residence that is a public or private place not meant for human habitation; or
- Is living in a publicly or privately operated shelter designed to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); or
- Is exiting an institution where (s)he has resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution.

Imminent Risk of Homelessness - Individual or family who will imminently lose their primary nighttime residence, provided that:

- Residence will be lost within 14 days of the date of application for homeless assistance;
- No subsequent residence has been identified; and
- The individual or family lacks the resources or support networks needed to obtain other permanent housing.

Homeless under Other Federal Statutes - Unaccompanied youth under 25 years of age, or households with children and youth, who do not otherwise qualify as homeless under this definition, but who:

- Are defined as homeless under the other listed federal statutes;
- Have not had a lease, ownership interest, or occupancy agreement in permanent housing during the 60 days prior to homeless assisted;
- Experienced persistent instability as measured by 2 moves or more during the preceding 60 days; and
- Can be expected to continue in such status for an extended period of time due to special needs or barriers.

Fleeing/Attempting to Flee Domestic Violence - Any individual or family who:

- Is fleeing, or is attempting to flee, domestic violence;
- Has no other residence; and
- Lacks the resources or support networks to obtain other permanent housing.

HUD encourages CoCs to prioritize funding for projects serving households with the highest level of need, including those that may be chronically homeless. However, only projects that serve individuals and families defined as chronically homeless must document chronic status for HUD. In order to be eligible for housing restricted to chronically homeless individuals or families under the CoC program, participants must meet the definition of chronically homeless. The definition of chronically homelessness is:

- A homeless individual with a disability as defined in section 401(9) of the McKinney-Vento Assistance Act (42 U.S.C. 11360(9)), who:
    - Lives in a place not meant for human habitation, a safe haven, or in an emergency shelter, and
    - Has been homeless and living as described for at least 12 months* or on at least 4 separate occasions in the last 3 years, as long as the combined occasions equal at least 12 months and each break in homelessness separating the occasions included at least 7 consecutive nights of not living as described.
- An individual who has been residing in an institutional care facility for less, including jail, substance abuse or mental health treatment facility, hospital, or other similar facility, for fewer than 90 days and met all of the criteria of this definition before entering that facility**; or
- A family with an adult head of household (or, if there is no adult in the family, a minor head of household) who meets all of the criteria of this definition, including a family whose composition has fluctuated while the head of household has been homeless.

*A “break” in homelessness is considered to be 7 or more nights.

**An individual residing in an institutional care facility does not constitute a break in homelessness.

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Nature and Extent of Homelessness: (Optional)

Race:	Sheltered:	Unsheltered (optional)
White	153	
Black or African American	350	
Asian	5	
American Indian or Alaska Native	3	
Pacific Islander	0	
Multi-Racial (all other)	6	
Ethnicity:	**Sheltered:**	**Unsheltered (optional)**
Hispanic	25	
Not Hispanic	511	

Estimate the number and type of families in need of housing assistance for families with children and the families of veterans.

From information provided by the CoC, ten (10) families with children and four (4) veterans in Union County were in need of housing assistance. One (1) veteran and no (0) families were unsheltered at the time of the 2025 PIT count.

Describe the Nature and Extent of Homelessness by Racial and Ethnic Group.

In Union County, there were 350 Black or African American homeless persons (including Black and Hispanic) or 31.4% of the total homeless population who were considered homeless. The next largest category was 153 White persons (including White and Hispanic) or 59.8% who were considered homeless. There were less than fifteen persons from all other racial groups who were considered homeless. In terms of ethnicity, 25 Hispanic or Latino persons were homeless as opposed to 511 persons who were not Hispanic or Latino.

Describe the Nature and Extent of Unsheltered and Sheltered Homelessness.

The need for shelter is still present in Union County, with 67 persons being unsheltered at the time of the 2025 Point-In-Time (PIT) Count. The Union County Social Services Department, the Community Shelter of Union County, Turning Point, and their governmental and nonprofit social service colleagues are working to reduce the involuntary homeless rate to zero.

The North Carolina Coalition to End Homelessness reported that for the NC-503 Balance of State CoC 2025 PIT Count in Union County there were ten (10) families with children totaling 37 persons, but the study recorded no (0) children without guardians that were experiencing homelessness. There were also seven

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(7) unaccompanied youth between the age of 18 and 24 and eight (8) youth parents with children. However, it is especially difficult to identify this demographic when they are “doubling up” (living with friends and relatives, “couch surfing”, etc.). There is also a potential overlap with persons who speak a non-English language at home, or with those who are wary of government intervention. Finally, persons exiting foster care are at high risk of becoming homeless due to lack of a family support system, difficulty transitioning out of the foster care system, and a higher rate than average of mental health challenges and substance abuse.

Anecdotally, according to service providers there has been an increase in the number of elderly and disabled persons experiencing homelessness. This can be a result of them having been released from medical or correctional institutions without suitable living arrangements but is more often due to being unable to afford the cost of living in Union County.

Discussion:

Part of the Charlotte MSA, Union County is split fairly evenly between suburban and rural areas. The large majority of its population lives in the west side of the County. The County seat of Monroe is in the center of Union County and is where most of the County’s social service providers are based, though residents may also access services elsewhere in the Piedmont Region of the CoC.

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NA-45 Non-Homeless Special Needs Assessment - 91.205 (b, d)

Introduction:

The assessment of non-homeless special needs includes the following:

- Elderly persons
- Frail elderly persons
- Persons with mental, physical and/or developmental disabilities
- Persons with alcohol or other drug addictions
- Persons with HIV/AIDS and their households
- Victims of domestic violence, dating violence, sexual assault, and stalking

The housing needs of each of these groups were determined by consultation with social service providers and statistical information provided by social services providers.

Describe the characteristics of special needs populations in your community:

- According to the 2019-2023 ACS Data, elderly persons represent approximately 13.2% of the County's total population. Approximately 5.1% of the elderly population is aged 75 years and older. In addition, 7.2% of the population is aged 65 and over and lives alone.
- Frail Elderly are those persons who are elderly and have a disability. It is estimated that approximately 30.1% of the County's elderly population (or 3.9% of the County's total civilian noninstitutionalized population) are frail elderly.
- Persons with mental, physical and/or developmental disabilities comprise approximately 9.2% of the total civilian non-institutionalized population of Union County.
- Persons with HIV/AIDS and their households comprise a small percentage of the County's overall population. According to the NC Department of Health and Human Services, as of December 2024 there were 383 persons diagnosed with HIV who lived in Union County.
- Victims of domestic violence, dating violence, sexual assault and stalking have fluctuated in Union County. Turning Point, Inc. reported that in 2023-2024, they had 1,199 clients seeking services for domestic violence and sexual assault, down from 1,625 in 2022-2023 but up from 429 in 2020-2021. This does not reflect the full extent of domestic and sexual violence, only the number of persons who obtained assistance from the shelter.

What are the housing and supportive service needs of these populations and how are these needs determined?

Using resident surveys, stakeholder surveys, roundtable discussions, data analysis, and public meetings, the following needs were determined for the non-homeless special needs' population in the County:

- **Elderly** - There is a need to rehabilitate existing housing and to construct new affordable and accessible housing to allow elderly residents to age in place.
- **Frail Elderly** - There is a need to rehabilitate and improve ADA accessibility in existing housing, to construct new affordable and accessible housing, to enforce reasonable accommodations by landlords, and to improve the quality and availability of supportive services to allow frail elderly residents to age in place.
- **Persons with Disabilities** - There is a need to improve ADA accessibility in existing housing, to construct new affordable and accessible housing, to enforce reasonable accommodations by landlords, to improve the quality and availability of supportive services and transportation, and increase employment opportunities to allow residents with disabilities to live independently.
- **Alcohol and Other Drug Addictions** - There is a need for more transitional housing, wraparound supportive services, and post-treatment case management in the County, to allow residents in recovery to reenter the workforce and everyday life.
- **Persons with HIV/AIDS** - There is a need for more permanent housing and healthcare options, and for the County to assist in enforcing Fair Housing regulations, to allow residents with HIV/AIDS to live independently and without discrimination.
- **Public Housing Residents** - There is a need for job training, financial literacy education, down payment and closing cost assistance, and life skills training to help voucher recipients and PBV residents transition into market-rate housing.
- **Victims of Domestic Violence** - There is a need for more dedicated temporary shelter beds, permanent housing options, and supportive services to allow domestic violence, trafficking, and assault victims and their families to recover and thrive in safety.

In addition to the above, the following services will help at-risk persons improve their lives:

- Employment training and education
- Job placement assistance
- Computer and Broadband Internet access
- Job interview skills
- Improved transportation
- Housing programs such as rent and deposit assistance

Discuss the size and characteristics of the population with HIV/AIDS and their families within the Eligible Metropolitan Statistical Area:

The North Carolina Department of Health and Human Services estimates that as of December 31, 2024 there were a total of 38,614 individuals diagnosed and living with HIV statewide. Of these, 383 individuals were living in Union County. There were 15 new diagnoses in 2024, giving a diagnosis rate of 7.0 diagnoses per 100,000 persons; this is less than half of the statewide rate of 15.1/100,000. There were 185 residents of Union County living with Stage 3 AIDS at the end of 2024. There is a need to reinforce the healthcare

system in Union County to ensure that pre-exposure and post-exposure prophylaxis is widely available to prevent the further spread of HIV, as well as to treat those persons whose HIV has developed into AIDS.

Discussion:

The needs of the Special Needs Population are based on data from HUD, the US Census, the State of North Carolina, the Continuum of Care, and housing providers and social service agencies. Gaps or overlaps in data collection are due to factors such as the rural nature of eastern Union County, difficulty in collecting statistics for specific population subsets, the transient nature of at-risk residents, and that persons may use service providers elsewhere within the Charlotte MSA in both North and South Carolina.

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NA-50 Non-Housing Community Development Needs - 91.215 (f)

Describe the jurisdiction's need for Public Facilities:

The following are the needs for improvement to public facilities in the County:

- Public facilities need to be ADA compliant and brought up to County Codes and Ordinances.
- Public facilities need to be open and available to all residents on an equal basis.
- Public facilities need to be available to maintain quality of life for residents.
- Public facilities need to be improved and expanded to meet the increase in population.
- The County should have more satellite facilities outside of Monroe.
- Existing recreation facilities such as parks and trails need to be improved and made accessible.
- New recreation facilities should be added around the County to meet the increase in population.
- A multimodal recreational corridor linking Union County's municipalities would create a stronger sense of place for residents.

How were these needs determined?

These needs were determined using resident surveys, stakeholder surveys, roundtable discussions, data analysis, public meetings, and the County's *Union County 2050* Comprehensive Plan.

Describe the jurisdiction's need for Public Improvements:

The following are the needs for public improvements in the County:

- Provide additional handicap accessibility at public buildings and facilities.
- Improve the County's road network in cooperation with NCDOT and the municipalities, especially when future development is expected.
- Reconstruct current secondary roads and their sidewalks & curbs, including ADA curb cuts.
- Improve and extend the sanitary sewer system to provide for present levels of use, future residential development, and potential industrial use.
- Improve the potable water distribution system to handle the increase in housing and industry, and to eliminate private wells to eliminate potential arsenic and other contaminants.
- Upgrade the stormwater management system to account for future natural disasters such as flooding and hurricanes.
- Improve parks and playground equipment.
- Help social service groups create more year-round low-barrier shelter space.
- Consider creating a day shelter as a central location for homeless persons to access services and employment training.
- Fire and EMS stations should be constructed in rural areas of the County, and suburban stations should be upgraded.

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How were these needs determined?

These needs were determined using resident surveys, stakeholder surveys, roundtable discussions, data analysis, public meetings, and the County's *Union County 2050* Comprehensive Plan.

Describe the jurisdiction's need for Public Services:

The County provides public safety and other public services for its residents, both directly and through its municipal partners. The following are the needs for public services:

- Fire and EMS substations need to be located in all corners of the County to reduce transit time and increase effectiveness.
- The sheriff and police departments should continue their efforts to curtail human trafficking and drug trade in the County.
- Public transportation needs to be expanded and made easier to use.
- Continue code enforcement efforts to ensure the health and safety of residents.
- Consider creating a rental registration program to help ensure the availability of high-quality affordable housing.
- Work with municipalities and unincorporated communities on neighborhood clean-up programs.
- Support, encourage, and affirmatively further fair housing throughout the County, in cooperation with municipalities and fair housing organizations.
- Increase support to organizations that provide housing and utility assistance.
- Ensure that County services are available to persons who do not speak English fluently.

How were these needs determined?

These needs were determined using resident surveys, stakeholder surveys, roundtable discussions, data analysis, public meetings, and the County's *Union County 2050* Comprehensive Plan.

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Housing Market Analysis

MA-05 Overview

Housing Market Analysis Overview:

According to the Charlotte Urban Institute, a program of the University of North Carolina at Charlotte:

"More than any other county in the Charlotte region, Union represents the dramatic suburban growth that has transformed rural areas surrounding Mecklenburg into sprawling residential "bedroom communities". Union's growth over the past few decades has been staggering. US Census estimates since 2000 have consistently listed Union not only as North Carolina's fastest growing county, but among the fastest growing in the United States as well. This growth took place in a relatively short period of time, and across an agricultural landscape in western Union that had little in the way of established urban areas, or the infrastructure necessary to support them, beforehand. Therefore, much of Union's growth has taken the form of the low-density residential and commercial development characteristic of American suburbs of the past twenty years. The recent economic recession and its impact on the housing industry in particular have, for the first time in a decade, cooled Union's rapid growth. Once the economy turns around, however, observers will be watching closely to see if Union County picks up where it left off, or if this brief respite has caused some local communities to reassess their attitudes toward growth in substantive ways."

According to the 2019-2023 American Community Survey estimates, there were 86,730 housing units in Union County of which 82,231 were occupied. Of these occupied housing units, there were 67,303 owner-occupied housing units (81.8% of all occupied housing units) and 14,928 renter-occupied housing units (18.2% of all occupied housing units). The large majority (79.8%) of housing units were built in 1980 or afterwards. A priority of the County's Comprehensive Plan is to ensure that public infrastructure is sufficient to allow responsible development of housing in rural, suburban, and town center areas. Additionally, the County recognizes the need to create and rehabilitate owner-occupied and renter-occupied housing of all types and price points, with a focus on low-income housing for seniors, persons with disabilities, and working families.

The 2019-2023 ACS data indicated that 5.2% (4,499) of the County's housing units were vacant. The estimated median home value in 2023 was $374,400 and the estimated median contract rent was $1,390/month for the same time period. This was a 63.4% increase in median home value and a 41.3% increase in median rent compared to 2018. Union County intends to continue its home repair program to help increase the amount of decent, safe, sound and sanitary housing and thereby keep the rising home prices in check.

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MA-10 Number of Housing Units - 91.210(a)&(b)(2)

Introduction

According to the 2019-2023 ACS data there were 86,730 total housing units in the County. Of these, 82,231 units are occupied and 4,499 units are vacant. There are 67,303 owner-occupied units and 14,928 renter-occupied units. A plurality of both owner-occupied residences (43.8% or 29,463 housing units) and renter-occupied housing units (43.4% or 6,483 housing units) have 3 bedrooms.

All residential properties by number of units

Property Type	Number	%
1-unit detached structure	75,130	86.6%
1-unit, attached structure	2,502	2.9%
2-4 units	1,765	2.0%
5-19 units	2,369	2.7%
20 or more units	810	0.9%
Mobile Home, boat, RV, van, etc	4,154	4.8%
Total	**86,730**	**100%**

Table 28 - Residential Properties by Unit Number

Data Source: 2019-2023 ACS

Unit Size by Tenure

	Owners		Renters	
	Number	%	Number	%
No bedroom	183	0.3%	357	2.4%
1 bedroom	297	0.4%	1,061	7.1%
2 bedrooms	4,741	7.0%	4,423	29.6%
3 or more bedrooms	62,082	92.2%	9,087	60.9%
Total	**67,303**	**100%**	**14,928**	**100%**

Table 29 - Unit Size by Tenure

Data Source: 2019-2023 ACS

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Describe the number and targeting (income level/type of family served) of units assisted with federal, state, and local programs.

The number and type of units in Union County that are assisted with Federal, State and Local Programs are as follows:

- **Public Housing** – The Monroe Housing Authority (MHA) no longer offers traditional public housing after completing its Rental Assistance Demonstration (RAD) conversion. Its nonprofit affiliate CARE owns and operates 205 Project-Based Voucher (PBV) housing units of which 44 are elderly & disabled units and 160 are family units. These units are intended for households with income levels at or below 80% of AMI.
- **Housing Choice Vouchers** – MHA manages 325 Tenant-Based Housing Choice Vouchers and 39 Mainstream vouchers, along with the above 205 PBVs. These vouchers are intended for households with income levels at or below 80% of AMI.
- **First Time Home Buyers** - The County government does not offer first-time homebuyer assistance. First-time homebuyers are directed toward the Monroe-Union County Community Development Corporation, which offers homebuyer counseling and assistance.
- **LIHTC Housing** - There are 9 LIHTC housing developments in the County with a total of 303 units.

Provide an assessment of units expected to be lost from the affordable housing inventory for any reason, such as expiration of Section 8 contracts.

There are no affordable housing units expected to be lost and no Section 8 Contracts that are anticipated to expire.

Does the availability of housing units meet the needs of the population?

Union County has added approximately 7,000 housing units in the last five years but the housing vacancy rate has remained nearly constant since 2018. The median contract rent is over 40% higher than five years ago, and the median home value has risen by nearly two-thirds. Based on the above data and input from stakeholders and residents, Union County is losing its ability to meet housing demand.

Describe the need for specific types of housing:

There is a need for affordable, decent, safe, sanitary, and sound housing, particularly low-income workforce housing and accessible housing for seniors and persons with disabilities.

Housing cost burden continues to increase for both homeowners and renters in Union County. According to HUD estimates, in FY 2024 35% of Union County residents had a median household income of 80% or less than the Charlotte-Concord-Gastonia, NC-SC Area Median Income, and 18% had a median household

income of 50% or less of the Charlotte MSA Area Median Income. The 2019-2023 American Community Survey shows that an estimated 7.7% of County residents and 5.7% of households had incomes at or below the poverty line. The ACS-estimated median household income in 2023 was $99,243. Even though this exceeded the estimated 2023 national median household income of $96,922, the high cost of housing in Union County has led to cost burdens above 30% of household income for 9.0% of homeowners without a mortgage, 22.5% of homeowners with a mortgage, and 43.6% of renters. It is necessary to both increase the median household income and decrease housing costs for the lowest quartile of County households.

Of Union County's civilian noninstitutionalized population, 8.1% were elderly persons (age 65 or older), 9.4% had at least one disability, and 3.9% were "Frail Elderly" persons age 65 or older with at least one disability. The County has prioritized the ability of its residents to age in place, meaning that they need to ensure the availability of accessible units. The Monroe Housing Authority does not have enough participating landlords with accessible properties, nor does CARE have enough accessible housing units to meet the needs of the increasing number of low-income seniors in the County. The County and its partner Union-Anson County Habitat for Humanity have undertaken a Home Repair Program funded through CDBG, but this will also not fully fill the need for accessibility improvements.

Discussion

Union County has prioritized investment in new construction and rehabilitation work, but more construction, rehabilitation, and code enforcement is still needed to increase availability of affordable, decent, safe, sanitary, accessible and sound housing.

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MA-15 Housing Market Analysis: Cost of Housing - 91.210(a)

Introduction

Union County has seen a large increase in housing values over the last five years. As of the 2014-2018 American Community Survey, the estimated median home value in Union County was $229,200, but the 2019-2023 ACS gives a median home value of $374,400, a 63.4% increase. Zillow Research indicates that as of December 31, 2025, the median county-wide sales price for homes was $442,052.52.

As for rental costs, the 2019-2023 ACS shows that median rent rose from $984/month in 2018 to $1,390/month in 2023, a 41.3% increase. Over half (57.7%) of rental housing units cost between $1,000 and $1,999 per month as of the 2023 estimates. Zillow Research indicates that as of December 31, 2025, the county-wide typical observed rental rate was $2,042.28 per month.

As of December 11, 2025, there were 1,335 homes listed for sale in Union County on Zillow of which 1,172 were single-family detached houses. Within the overall total, there were 24 units listed as being in the pre-foreclosure, auction, or bank-owned stages of the foreclosure process.

According to the 2017-2021 CHAS estimates there were only 285 vacant-for-rent housing units that were affordable to households making 50% or less of the HUD Area Median Family Income (HAMFI). Only 165 vacant-for-sale housing units were affordable to households at 50% or less of HAMFI.

Cost of Housing

	Base Year: 2018	Most Recent Year: 2023	% Change
Median Home Value	$229,200	$374,400	63.4%
Median Contract Rent	$984	$1,390	41.3%

Table 30 - Cost of Housing

Data Source: 2014-2018 and 2019-2023 ACS

Rent Paid	Number	%
Less than $500	420	3.1%
$500-999	2,675	19.6%
$1,000-1,499	4,687	34.4%
$1,500-1,999	3,123	22.9%
$2,000 or more	2,737	20.1%
Total	**13,642**	**100%**

Table 31 - Rent Paid

Data Source: 2019-2023 ACS

Housing Affordability

% Units affordable to Households earning	Renter	Owner
30% HAMFI	10	N/A
50% HAMFI	275	165
80% HAMFI	140	35
100% HAMFI	N/A	100
Total	**460**	**500**

Table 32 - Housing Affordability

Data Source: 2017-2021 CHAS

Monthly Rent

Monthly Rent ($)	Efficiency (no bedroom)	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Fair Market Rent	$1,586	$1,647	$1,824	$2,250	$2,852
High HOME Rent	$1,258	$1,349	$1,621	$1,863	$2,059
Low HOME Rent	$982	$1,052	$1,262	$1,458	$1,627

Table 33 - Monthly Rent

Data Source: FY 2025 HUD FMR and HOME Rents

Is there sufficient housing for households at all income levels?

The HUD CHAS data indicates that there is not sufficient housing for all income levels due to the high rate of housing problems for persons in the 0-30% AMI (of which 72% have housing problems) and 30-50% AMI (of which 65% have housing problems) categories.

How is affordability of housing likely to change considering changes to home values and/or rents?

The affordability of housing units has continued to decrease as the County's population and inflation increases, and it appears that this trend will continue. Union County and its development partners are committed to constructing and renovating more housing to ease market stresses.

How do HOME rents / Fair Market Rent compare to Area Median Rent? How might this impact your strategy to produce or preserve affordable housing?

According to Zillow Research data dated December 31, 2025 (the last available data), the typical observed market rate for rental units in Union County, NC was $2,042.28. In comparison with the most common category of rental units in Union County (three-bedroom units), the three-bedroom FY 2025 HUD Fair

Market Rent for the Charlotte MSA was $2,250, the Low HOME Rent limit was $1,458, and the High HOME Rent limit was $1,863. It is likely that future rental housing developments will be targeted to persons whose income is at or above 100% of Area Median Income, so the County is committed to working with developers to ensure that low- and moderate-income housing is included in new housing projects.

Discussion

Union County has experienced a large price increase in both rental and for-sale housing. This is driven by continued demand from the overflow of persons leaving Charlotte and Mecklenburg County as well as new arrivals to the Charlotte MSA seeking lower cost but high-quality single-family housing, but also factors including wage stagnation and inflation on the national level. These pressures have made housing less affordable for residents of Union County, which particularly impacts those with low-paying jobs and those who are not in the labor market and living on fixed incomes. A priority of the County is to expand its owner-occupied housing renovation program, which will help improve housing accessibility, safety and energy efficiency for low- and moderate-income households who are most likely to be cost burdened. It will also continue to partner with organizations and agencies that may be able to assist at-risk households with energy, utility, and rent or mortgage payments.

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MA-20 Housing Market Analysis: Condition of Housing - 91.210(a)

Introduction

Due to a suburban building boom corresponding with the growth of Charlotte into an international business hub, the 2019-2023 ACS estimates that 80% of Union County housing was built since 1980. Only about 20% were built prior to 1980 and subject to potential asbestos and lead-based paint hazards, and only 4% of existing housing units were built prior to 1950. Of the 82,231 occupied housing units in the County, 18,408 housing units (22.4%) have at least one "selected housing condition."

Define “standard condition” and “substandard condition but suitable for rehabilitation”:

In Union County, substandard housing conditions typically include the following: structural hazards; poor construction; inadequate maintenance; faulty wiring; leaky plumbing; fire hazards; and inadequate sanitation. Substandard units suitable for rehabilitation are those units where the total rehabilitation costs do not exceed 25% of the post-rehabilitation value of the housing unit. The following definitions are used within the County:

- **"Selected Housing Condition" -** Overcrowding (1.01 or more persons per room), lacking a complete kitchen, lack of plumbing facilities, and/or other utilities, and cost burden of 30% or more of household income.
- **"Substandard condition" -** Does not meet code standards or contains one of the selected housing conditions.
- **"Substandard Condition but Suitable for Rehabilitation" -** The amount of work required to bring the unit up to minimum code standard, and the existing debt on the property, together are less than the fair market value of the property.
- **"Not Suitable for Rehabilitation" -** The amount of work required to bring the unit up to minimum code standards exceeds the fair market value of the property after rehabilitation work is complete.

Condition of Units

Condition of Units	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
With one selected Condition	12,498	18.6%	5,910	39.6%
With two selected Conditions	245	0.4%	538	3.6%
With three selected Conditions	34	0.0%	0	0%
With four selected Conditions	0	0%	0	0%
No selected Conditions	54,526	81.0%	8,480	56.8%
Total	**67,303**	**100%**	**14,928**	**100%**

Table 34 - Condition of Units

Data Source: 2019-2023 ACS

Year Unit Built

Year Unit Built	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
2000 or later	35,358	52.5%	4,348	29.1%
1980-1999	20,990	31.2%	5,641	37.8%
1960-1979	7,338	10.9%	2,939	19.7%
1940-1959	2,555	3.8%	1,177	7.9%
Before 1940	1,062	1.6%	823	5.5%
Total	**67,303**	**100%**	**14,928**	**100%**

Table 35 - Year Unit Built

Data Source: 2017-2021 CHAS

Risk of Lead-Based Paint Hazard

Risk of Lead-Based Paint Hazard	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
Total Number of Units Built Before 1980	11,040	17.0%	4,475	32.7%
Housing Units built before 1980 with children present	1,650	2.5%	968	7.1%

Table 36 - Risk of Lead-Based Paint

Data Source: 2017-2021 CHAS (Units with Children present)

Vacant Units

	Suitable for Rehabilitation	Not Suitable for Rehabilitation	Total
Vacant Units	4,350	149	4,499
Abandoned Vacant Units	20	20	40
REO Properties	20	4	24
Abandoned REO Properties	0	4	4

Table 37 - Vacant Units

Data Source: Union County Building Code Enforcement

Need for Owner and Rental Rehabilitation

As neither the Union County Building Code Enforcement Department nor the Union County Association of REALTORS track vacancies or outstanding code violations, the number of vacant units is an estimate from the 2019-2023 ACS and the number of real estate owned (REO) properties is a point-in-time count from Zillow. The cost of rehabilitation often exceeds the income of many low- and moderate-income households and sometimes exceeds the property's value. A number of these housing units cannot be rehabilitated and may become vacant due to their owners' lack of financial resources; these are often demolished and replaced by market-rate or luxury housing units which further reduces the number and

proportion of low- and moderate-income housing. There is a need for increased assistance to low- and moderate-income families to allow them to rehabilitate their properties.

Estimated Number of Housing Units Occupied by Low- or Moderate-Income Families with LBP Hazards

Lead poisoning affects many children age 6 or younger, causing lifelong learning and behavior problems by interfering in brain development. Though lead is a naturally occurring element, the largest source of lead contamination in the home is caused by chipping, peeling, flaking or deteriorating lead-based paint (LBP). Lead can also enter the home through some toys, jewelry, and other consumer products, lead potable water plumbing, contaminated soil from leaded gasoline and chemical processing, and industrial use of lead metal or chemicals. Lead poisoning has decreased over the years, but there is no safe level of lead. The only way to know if a child has been exposed is a blood test. Lead was banned from residential paint in 1978, but approximately half of the U.S. housing stock still contains some lead-based paint.

Only about 20% of the housing stock in Union County was built prior to 1980 and would have a higher risk of lead-based paint presence. Of these, 16.9% of units built prior to 1980 (or 3.3% of all housing units) are inhabited by children age 6 or younger. These housing units are more likely to have unabated lead-based paint present when occupied by low- and moderate-income households due to the prohibitive financial burden of lead-based paint abatement and would pose particular risks to the children living in these units.

Discussion

In determining the risk factors for housing problems, the above research gives only a general idea of risks within Union County. Additional factors include the environmental quality and risks where these units are located, such as construction quality, soil and air contaminants, and risk of manmade and natural disasters. The census information only reports on the number of persons per room (overcrowding condition) and the lack of a complete kitchen, or plumbing facilities. These are general conditions and do not necessarily reflect the true conditions of houses in the area. More information can be obtained from housing inspections conducted by the Union County Department of Building Code Enforcement and the various municipal code enforcement departments within Union County.

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MA-25 Public and Assisted Housing - 91.210(b)

Introduction

The Monroe Housing Authority (MHA) administers Section 8 Housing Choice Vouchers in Union County but no longer provides traditional public housing. Its partner nonprofit Community Advancement and Redevelopment Enterprise (CARE) own and operates the former MHA public housing properties as Rental Assistance Demonstration (RAD) Project-Based Voucher (PBV) residences. MHA is and will continue to be the primary resource for the County's very low-income households. As of its Draft FY 2026 Annual Plan, the Housing Authority administered 369 Section 8 Housing Choice Vouchers and CARE managed 205 PBV housing units.

The following statistics were obtained from the HUD Public & Indian Housing Information Center (PIC) and the Monroe Housing Authority. Data on accessible housing units was not available.

Total Number of Units

Program Type									
	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project - based	Tenant - based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers in use	0	0	0	369	205	325	0	0	39
Accessible units	0	0	0	0	0	0	0	0	0
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 38 - Total Number of Units by Program Type

Data Source: PIC (PIH Information Center)

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Describe the supply of public housing developments:

Describe the number and physical condition of public housing units in the jurisdiction, including those that are participating in an approved Public Housing Agency Plan:

Between 2022 and 2024, the Monroe Housing Authority converted its portfolio of 205 public housing units to Project-Based Voucher (PBV) units through the Rental Assistance Demonstration (RAD) program. These units are now managed by MHA's partner nonprofit Community Advancement and Redevelopment Enterprise (CARE).

The last HUD inspection listed for the four CARE properties was in 2017 prior to their RAD conversion, at which time the properties achieved a combined rating of 82/100.

Aside from the aforementioned RAD PBV developments, there are eight HUD Multifamily Housing developments in Union County. Their inspection scores are as follows:

Public Housing Condition

Public Housing Development	Average Inspection Score
ARC/HDS UNION COUNTY GROUP HOME #3	98
ARC/HDS UNION COUNTY GROUP HOME #2	99
ARC/HDS UNION COUNTY GROUP HOME #1	99
GATEWOOD VILLAGE	92
ICEMORLEE STREET APARTMENTS	83
JEFFERSON VILLAGE APARTMENTS	73
Cotton Street Commons	95
ARC Union Apartments (The)	98

Table 39 - Public Housing Condition

Describe the restoration and revitalization needs of public housing units in the jurisdiction:

The Rental Assistance Demonstration (RAD) program provides a powerful tool to preserve and improve affordable housing currently supported under the public housing, Section 8 Moderate Rehabilitation, Moderate Rehabilitation Single Room Occupancy, and Section 202 and Section 811 Rental Assistance Contract programs. Under RAD, properties are placed under a long-term rental assistance contract, providing long term affordability while maintaining and strengthening resident rights.

The Monroe Housing Authority opted to take part in the RAD program to leverage both Federal and private capital funds to afford necessary upgrades and upkeep for its housing properties. The 205 former MHA public housing units are now managed by MHA's partner nonprofit Community Advancement & Redevelopment Enterprise (CARE).

In terms of upcoming capital expenditures, CARE staff noted that they intend to install individual water meters for each housing unit rather than having a single-point water shutoff for each community, which will allow units to undergo water line repair and replacement without disruption to other tenants.

Describe the public housing agency's strategy for improving the living environment of low- and moderate-income families residing in public housing:

Monroe Housing Authority maintains a voluntary Family Self-Sufficiency (FSS) program that is available to households receiving a subsidy through MHA's HCV, PBV, and RAD-PBV programs. MHA households in compliance with MHA, CARE, and FSS regulations are eligible for FSS participation. The FSS program seeks to help families make progress toward economic security by supporting the family's efforts to increase their earned income, build financial capability, and achieve their financial goals. The following is a list of the supportive service needs of the families expected to enroll in the MHA FSS program:

- Training in basic skills and executive function (including household management)
- Employment training, including sectoral training and contextualized and/or accelerated basic skills instruction
- Job placement assistance
- GED preparation
- Higher education guidance and support
- English as a Second Language
- Assistance accessing and paying for child care
- Transportation assistance
- Financial coaching, including assistance with budgeting, banking, credit, debt, and savings
- Access to counseling or treatment for substance abuse and mental health
- Dental care, health care, and mental health care including substance abuse treatment and counseling
- Homeownership readiness

Upon enrollment in the Family Self-Sufficiency program, the FSS Coach will meet with the family to conduct an FSS needs assessment. This assessment will inform the development of the Individual Training and Services Plan (ISTP) and determine supportive services needed and/or barriers to overcome for the FSS family to achieve the goals outlined in the ISTPs to successfully complete the program. FSS Coaches may also utilize various financial assessments to assist participants to develop individual financial goals and determine what types of financial education and coaching are needed. Ongoing needs and financial

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assessments may be administered by the FSS Coach through regular participant outreach and engagement activities to inform any changes that need to be made to the ISP.

The Monroe Housing Authority's FSS Coaches will provide referrals to the following services as needed to help FSS participants achieve their goals:

- Assessment for educational and disability needs
- After-school child care (with Rising Star Daycare)
- Assistance with car repairs and purchase
- High School equivalency/GED (with Union County Public Schools)
- Child and Adult Protective Services
- Household management training
- Homeownership preparation
- Financial empowerment
- Individual Development Accounts
- Legal services
- Debt resolution and credit repair

According to the Housing Authority's Agency Plan, the housing authority is able to house applicants with disabilities in a reasonable time and has experienced no problems with finding units that fit the accessibility needs of the disabled. Applicants are asked if any member of the household requires a reasonable accommodation in order to access MHA programs or CARE facilities. If accommodations are required, MHA will work with the client to meet their needs. The housing authority is not fully aware of the client's specific needs until housing is available, at which point the household in need will coordinate with MHA/CARE staff to determine what reasonable accommodations can be made.

All four of the CARE PBV communities have resident councils which meet monthly. MHA also offers periodic community activities at its CARE locations. Past activities have included free CPR courses, Back To School supply giveaways, and help with preparing family emergency plans for natural disasters such as hurricanes.

Discussion:

The Monroe Housing Authority continues to be the primary housing resource for the County's very low-income households, both directly via Housing Choice Vouchers and in partnership with CARE for Project-Based Voucher housing.

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MA-30 Homeless Facilities and Services - 91.210(c)

Introduction

Union County is part of Region 5 of the NC-503 North Carolina Balance of State Continuum of Care (BOSCoC). Locally, the BOSCoC's activities are administered by the Community Shelter of Union County. Members of the CoC include Union County Social Services as well as other governmental and nonprofit social service agencies, shelter providers, and housing providers. Using the Homeless Management Information System (HMIS) as a tool to provide services to homeless individuals and families, case managers are able to work with clients to identify their needs and challenges and provide unduplicated assistance. Case managers are the main contact for supportive services and housing.

Facilities and Housing Targeted to Homeless Households

	Emergency Shelter Beds		Transitional Housing Beds	Permanent Supportive Housing Beds	
	Year Round Beds (Current & New)	Voucher / Seasonal / Overflow Beds	Current & New	Current & New	Under Development
Households with Adult(s) and Child(ren)	49	0	0	24	0
Households with Only Adults	81	0	0	31	0
Chronically Homeless Households	n/a	n/a	n/a	n/a	n/a
Veterans	0	0	0	0	0
Unaccompanied Youth	0	0	0	0	0

Table 40 - Facilities and Housing Targeted to Homeless Households

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Describe mainstream services, such as health, mental health, and employment services to the extent those services are used to complement services targeted to homeless persons

The Piedmont Region of the NC BOSCoC has an intake assessment process that identifies the additional services an individual or family may need and has created a streamlined referral process. The Piedmont Region covers five counties; in four of the counties, the emergency shelters act as the designated coordinated assessment sites in the County. These facilities are natural places for persons to seek help in the region. The assessment sites include Union County Community Shelter, Stanly County Community Inn, Crisis Ministry of Davidson County and Rowan Helping Ministries. Agencies in the region are committed to conducting the Emergency Response Screening in person for each individual or family that presents for shelter at any time.

Financial Assistance

Union County Community Support and Outreach is the local administrator of the North Carolina Work First program, which helps resident children and families in temporary financial crisis achieve self-sufficiency through financial assistance, employment and supportive services. The program uses a strength-based, family-centered approach. The program goals are: job readiness and employment; child well-being; economic self-sufficiency; and improved physical and mental health for families. To apply for Work First, families must provide documentation of identity, address or living arrangement, age, kinship, citizenship or legal alien status, Social Security number, income, and financial assets or resources.

Mental Health Services

Partners Health Management is a public local management entity/managed care organization (MCO) whose mission is to be a Member Care Organization. The organization offers health plans for Tailored Plan members, state-funded recipients, and NC Medicaid Direct beneficiaries in 15 North Carolina counties: Burke, Cabarrus, Catawba, Cleveland, Davidson, Davie, Forsyth, Gaston, Iredell, Lincoln, Rutherford, Stanly, Surry, Union and Yadkin. It prioritizes integrated-whole person care for our members and families, with a focus on mental health, substance use disorders, intellectual/developmental disabilities and traumatic brain injuries. Depending on client health plan, it covers services for behavioral health, I/DD, physical health and pharmacy.

Veterans Affairs

W.G. Hefner VA Medical Center in Salisbury, NC is the local veteran services provider with seventy-three (73) Permanent Supportive Housing beds for veterans. The SSVF program provides rapid rehousing and prevention services for veterans and their families. Rowan Helping Ministries in Salisbury maintains fourteen (14) beds for veterans, but Salisbury is over fifty miles from Monroe and there are no beds specifically set aside for veterans at the Union County Community Shelter. The Region 5 system utilizes the VA's hotline for veterans in need of assistance with housing, health care and mental health services. Veterans in need of assistance can either contact the State Veteran Service Center at 7508 E.

Independence Blvd, Suite 119, Charlotte NC 28227, or the Union County Veterans Services Office in the County Government Building. The US Veterans Administration has designated Volunteers of America of the Carolinas, Inc. as the SSVF administrator for North Carolina.

Prevention Services

Households are able to access prevention services through linkages from service providers in the community. Veterans access SSVF by contacting the SSVF grantees in the BOSCoC. Volunteers of America of the Carolinas, Inc. is the administrator for SSVF in the Piedmont Region.

Legal/Judicial System

The Union County Community Shelter (UCCS) has developed relationships with local law enforcement in the community. UCCS staff educates law enforcement on what services are available and how to make referrals for citizens that may show signs of being at risk.

List and describe services and facilities that meet the needs of homeless persons, particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth. If the services and facilities are listed on screen SP-40 Institutional Delivery Structure or screen MA-35 Special Needs Facilities and Services, describe how these facilities and services specifically address the needs of these populations.

Union County Community Support & Outreach (CSO) works to promote a healthy community, as well as culturally and linguistically appropriate services, through training, health education and promotion, and outreach. CSO seeks to serve as a convener of local and regional agencies with the goal of maximizing partnerships. With its community partners, CSO identifies key issues and works together to building a healthier Union County by systematically addressing the social determinants of health that impact access.

CSO programs touch three main areas: management of federal and state economic stability programs; delivery of nutrition services to vulnerable populations; and provide community outreach and engagement activities including volunteer coordination, health education, and parenting programs.

The Community Shelter of Union County (aka Union County Community Shelter, UCCS) provides Emergency Shelter, Food, and Rehousing. Its low-barrier services support equitable opportunities because safe, affordable housing and access to food are basic human rights. UCCS programs are aimed at making episodes of homelessness and food insecurity brief, rare, and one time only. This is accomplished through the following services:

- Emergency Shelter for adults and families
- Rapid Rehousing
- Soup Kitchen (three meals a day)
- Drive Thru Pantry

- Senior Food Boxes
- Step It Up Bicycle Program
- Employment Lab
- Home Again housing support
- Seasonal Warming & Cooling Stations

Turning Point, Inc., is the only organization in Union County that provides emergency and lifesaving resources for survivors of domestic violence, sexual assault, and child abuse. It offers a wide range of services at no charge to the client. Turning Point believes that everyone who experiences abuse deserves a safe place to heal and receive the resources they need to seek independence and justice. Turning Point's services include the following:

- 24/7 Crisis Line services
- 24/7 Safe Shelter
- Crisis intervention & referral
- Transportation and hospital accompaniment
- Professional counseling & support groups
- Case management
- Survivor advocacy
- Violence prevention and safety resources
- Tree House Children's Advocacy Center

During the last Five Year Consolidated Plan period, Community Link helped residents of Charlotte, Mecklenburg County and the surrounding counties to prevent homelessness, establish self-sufficiency, prepare their taxes and prepare for homeownership. However, after ninety-six years of operation the organization closed its doors on June 20, 2025. Other social service organizations have stepped in to fill the gaps, but Community Link's presence in the greater Charlotte area will be missed.

Mainstream services generally target specific categories of vulnerable individuals and families. These vulnerable populations of the chronically homeless and persons with HIV/AIDS are served by case management for health care, mental wellness, and housing assistance. Service providers in the community as well as County agencies work together and coordinate with each other to provide the homeless with the services they need.

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MA-35 Special Needs Facilities and Services - 91.210(d)

Introduction

Union County has identified priorities for services and facilities for its special needs population. This includes the elderly, frail elderly, persons with disabilities, persons with alcohol and substance addictions, persons with HIV/AIDS and their families, and public housing residents.

Including the elderly, frail elderly, persons with disabilities (mental, physical, developmental), persons with alcohol or other drug addictions, persons with HIV/AIDS and their families, public housing residents and any other categories the jurisdiction may specify, and describe their supportive housing needs

The following needs and objectives are established under this Five-Year Consolidated Plan:

- **Elderly** - There is a need to rehabilitate existing housing and to construct new affordable and accessible housing to allow elderly residents to age in place.
- **Frail Elderly** - There is a need to rehabilitate and improve ADA accessibility in existing housing, to construct new affordable and accessible housing, to enforce reasonable accommodations by landlords, and to improve the quality and availability of supportive services to allow frail elderly residents to age in place.
- **Persons with Disabilities** - There is a need to improve ADA accessibility in existing housing, to construct new affordable and accessible housing, to enforce reasonable accommodations by landlords, to improve the quality and availability of supportive services and transportation, and increase employment opportunities to allow residents with disabilities to live independently.
- **Alcohol and Other Drug Addictions** - There is a need for more transitional housing, wraparound supportive services, and post-treatment case management in the County, to allow residents in recovery to reenter the workforce and everyday life.
- **Persons with HIV/AIDS** - There is a need for more permanent housing and healthcare options, and for the County to assist in enforcing Fair Housing regulations, to allow residents with HIV/AIDS to live independently and without discrimination.
- **Public Housing Residents** - There is a need for job training, financial literacy education, down payment and closing cost assistance, and life skills training to help voucher recipients and PBV residents transition into market-rate housing.
- **Victims of Domestic Violence** - There is a need for more dedicated temporary shelter beds, permanent housing options, and supportive services to allow domestic violence, trafficking, and assault victims and their families to recover and thrive in safety.

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Describe programs for ensuring that persons returning from mental and physical health institutions receive appropriate supportive housing

Union County partners with local area nonprofits to help low-income individuals and families avoid homelessness. Subject to funding availability, Union County Crisis Assistance Ministries provides rent, mortgage, and/or utility assistance to low-income individuals and families to prevent homelessness. Other nonprofits, such as the ARC of Union County and the Council on Aging, work with their specialized populations to help prevent homelessness.

Partners Health Management is the Balance of State CoC Region 5 (Piedmont) area care manager of Medicaid and state-funded services for mental health treatment, intellectual and developmental disabilities, substance use disorders, and traumatic brain injuries in Union County and fourteen other central North Carolina counties. It does not directly provide treatment but ensures that providers meet strict quality standards, protect patient rights, and deliver medically necessary services. PHM also reviews appeals, hears complaints and ensures fair medical decisions.

Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. 91.315(e)

Given the limited CDBG funding available, Union County will continue to support services through the existing delivery systems embedded in the County's Department of Social Services. Support programs currently exist that meet the needs of these special populations. Moreover, Union County has extensive partnership with area nonprofits that also provide housing and supportive services to these populations.

Of Union County's civilian noninstitutionalized population, 8.1% were elderly persons (age 65 or older), 9.4% had at least one disability, and 3.9% were "Frail Elderly" persons age 65 or older with at least one disability. It is expected that these populations will increase during the FY 2026-2030 Five-Year Consolidated Plan period. Accordingly, there is a need to increase housing opportunities, services, and facilities for persons with special needs.

Goals:

- **SN-1 Housing -** Increase the number of decent, safe, sound, sanitary, accessible and affordable units that are available and accessible to all sectors of the special needs populations.
- **SN-2 Accessibility -** Promote and assist in making accessibility improvements to existing housing units, including making reasonable accommodations for the physically disabled so they can continue to remain in their homes.

- **SN-3 Social Services -** Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.
- **SN-4 Removal of Architectural Barriers -** Remove architectural barriers which restrict the mobility and access to public facilities and services for persons with physical disabilities.
- **CD-3 Public Services** - Improve and enhance public services and programs for youth, the elderly, persons with disabilities, and general social/welfare public service programs for low- and moderate-income County residents.
- **CD-4 Nutritional Services -** Promote and support food and nutrition programs to address the needs of the elderly and persons with disabilities, the unemployed, underemployed, and homeless.
- **CD-7 Transportation** - Support the expansion of public transportation and improvements to pedestrian, bicycle, and vehicular transportation routes to assist low- and moderate-income residents, the elderly, persons with disabilities, and persons with other special needs in accessing medical services, employment, childcare, training, and other essential needs and services.

For entitlement/consortia grantees: Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. (91.220(2))

The County continues to advocate for and coordinate with programs assisting families which struggle to meet everyday living needs. It intends to allocate FY 2026 CDBG funding to the following programs which will benefit residents of Union County with special needs:

- **CD-26-03 Council on Aging - In-Home Assistance for Seniors:** The Council on Aging in Union County's In-Home Assistance for Seniors program provides essential in-home services to economically disadvantaged older adults at no cost to clients. To qualify, clients must require assistance with at least one Activity of Daily Living (ADL) such as bathing, dressing, or grooming, and/or one Instrumental Activity of Daily Living (IADL) such as cleaning, cooking, or laundry in order to safely remain at home.

  The Council's team of In-Home Aides delivers direct assistance with personal care, household chores, errands, and respite for family caregivers. In addition, we conduct home safety evaluations and coordinate volunteer home modifications such as bathroom grab bars, stair handrails, and wheelchair ramps. We also provide access to durable medical equipment and incontinence supplies at no cost.

  CDBG funding will support 1.2 FTE (one full-time and one part-time) In-Home Aide positions, including salary, fringe, and mileage. The requested funding will specifically support services for approximately 30-40 low-to-moderate income older adults, providing personal care and

household assistance one to three times per week. Our agency is licensed for home care and remains fully compliant with all regulations set by the NC Department of Health and Human Services and the NC Division of Aging and Adult Services.

In future fiscal years of the Five-Year Consolidated Plan, requests for financial support to address housing and supportive services needs will be solicited and reviewed to determine where to direct support. The County also intends to provide non-CDBG funding to various nonprofit agencies that provide supportive services to persons who are not homeless but have other special needs.

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MA-40 Barriers to Affordable Housing - 91.210(e)

Negative Effects of Public Policies on Affordable Housing and Residential Investment

The population of Union County has exploded after decades of relative sleepiness with little to no growth. Between the 1970 and 2020 U.S. Censuses, the County's population grew from 54,717 persons to 238,267 persons. Union County's proximity to the Charlotte, NC Metropolitan Area has led to its massive growth. The County's population has grown 433% since 1960 after decades of little to no growth, for a yearly growth rate of 7.2%. The majority of this growth occurred between 1990 and 2020. The growth of Union County area is largely due to its role as a bedroom community for the Charlotte-Concord-Gastonia, NC-SC Metropolitan Statistical Area overlaid with its historic farming and forestry industries.

This demand has vastly increased the pressure on the County's housing market, and even with the housing boom there is a large disparity between the cost of owner-occupied housing and the financial resources of low- and moderate-income households. To ease these housing pressures and disparities the County will encourage and support a well-planned, diverse housing environment offering a mix of housing to all income groups and offering a safe and pleasant living environment. Neighborhoods will be strengthened through nurturing community spirit to create a sense of pride. The *Union County 2050* Comprehensive Plan outlines strategies that will help to garner public policy support and guide investment in affordable housing developments. Union County will also collaborate with its municipal partners to guide and regulate housing development, and to support the efforts of local non-profit housing providers who create and renovate affordable housing.

While the Plan addresses multiple areas, its primary areas of concern are traffic congestion, development density, rural character, agribusiness, flooding, safe drinking water, and broadband access. These all have either a direct or indirect impact on Union County's available affordable housing supply, from ensuring that affordable housing is sufficient and located in convenient areas without being overly concentrated, to making sure that in-person and remote jobs are available to residents.

Union County takes seriously its responsibility to not only facilitate affordable housing and residential investment, but also to ensure its ordinances and policies do not interfere in residents' ability to obtain affordable housing. The County's Budget & Grants Management and Building Code Enforcement departments periodically review County ordinances and policies to ensure that they remain in compliance with Federal and State law, and that they do not present barriers to affordable housing.

In terms of publicly funded programs, the County will continue to promote, finance, and expand its owner-occupied Home Repair Program. This public program has been effective in increasing the safety and efficiency of existing homes and reducing the cost burden for homeowners. The County's Building Code Enforcement Department will help to identify housing in need of rehabilitation. The County will also promote housing and utility assistance programs offered by nonprofit entities and will consider future CDBG funding applications from those organizations. It will continue to work with nonprofits to provide new or renovated housing to low-income families. The Monroe Housing Authority will continue to provide low-income eligible households with Section 8 vouchers to use at the property of their choice, and CARE

will continue to maintain and operate their four Project-Based Voucher properties to provide high-quality housing for low-income County residents. Finally, the County's Planning & Development Department will continue to identify properties for rehabilitation, renovation, or demolition and new construction.

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MA-45 Non-Housing Community Development Assets - 91.215 (f)

Introduction

Following is a brief summary of Union County's priority non-housing community development needs that are eligible for assistance per HUD's community development program categories. This community development component of the plan provides Union County specific long-term and short-term community development objectives, developed in accordance with the primary objective of the CDBG program.

Economic Development Market Analysis

Business Activity

Business by Sector	Number of Workers	Number of Jobs	Share of Workers %	Share of Jobs %	Jobs less workers %
Agriculture, Mining, Oil & Gas Extraction	1,198	706	1.0%	0.9%	-0.1%
Construction	10,910	10,282	8.9%	13.5%	4.6%
Manufacturing	14,120	11,876	11.5%	15.6%	4.1%
Wholesale Trade	3,559	3,994	2.9%	5.2%	2.3%
Retail Trade	14,409	8,613	11.7%	11.3%	-0.4%
Transportation, Warehousing and Utilities	6,022	2,618	4.9%	3.4%	-1.5%
Information	2,410	597	2.0%	0.8%	-1.2%
Finance, Insurance, and Real Estate	13,693	2,830	11.1%	3.7%	-7.4%
Professional, Scientific, Technical, Management, Administration and Waste Management Services	14,946	9,435	12.1%	12.4%	0.3%
Education, Health Care and Social Assistance	23,293	12,972	18.9%	17.0%	-1.9%
Arts, Entertainment and Accommodations	9,090	6,904	7.4%	9.1%	1.7%
Other Services, except Public Administration	6,158	2,509	5.0%	3.3%	-1.7%
Public Administration	3,454	2,815	2.8%	3.7%	0.9%
Total	123,262	76,151	--	--	--

Table 41 - Business Activity

Data Source: 2019-2023 ACS table DP03 (Workers); 2023 CES OnTheMap Work Area Profile Analysis (Jobs)

Labor Force

Total Population in the Civilian Labor Force	128,708
Civilian Employed Population 16 years and over	123,262
Unemployment Rate	4.2%
Unemployment Rate for Ages 16-24	5.6%
Unemployment Rate for Ages 25-65	2.7%

Table 42 - Labor Force

Data Source: 2019-2023 ACS

Occupations by Sector	Number of People
Management, business, science and arts	57,303
Farming, fishing, and forestry	487
Service	14,965
Sales and office	24,716
Natural resources, construction, and maintenance	11,226
Production, transportation and material moving	14,565

Table 43 - Occupations by Sector

Data Source: 2019-2023 ACS

Travel Time

Travel Time	Number	Percentage
< 30 Minutes	51,835	52.0%
30-59 Minutes	38,477	38.6%
60 or More Minutes	9,297	9.3%
Total	**99,609**	**--**

Table 44 - Travel Time

Data Source: 2019-2023 ACS

Education:

Educational Attainment by Employment Status (Population 25 to 64 years)

Educational Attainment	In Labor Force		
	Civilian Employed	Unemployed	Not in Labor Force
Less than high school graduate	6,665	390	3,851
High school graduate (includes equivalency)	18,688	1,003	6,342
Some college or Associate's degree	28,696	933	6,510
Bachelor's degree or higher	45,160	1,113	6,498

Table 45 - Educational Attainment by Employment Status

Data Source: 2019-2023 ACS

Educational Attainment by Age

	Age				
	18-24 yrs	25-34 yrs	35-44 yrs	45-64 yrs	65+ yrs
Less than 9th grade	1,424	1,115	1,532	2,444	1,768
9th to 12th grade, no diploma	3,031	1,713	1,292	3,525	2,455
High school graduate, GED, or alternative	12,022	6,597	5,867	14,335	10,134
Some college, no degree	10,472	5,878	5,829	13,305	6,348
Associate's degree	3,195	2,248	2,768	6,469	2,716
Bachelor's degree	10,549	6,105	9,571	19,091	5,688
Graduate or professional degree	5,416	3,087	5,924	9,995	3,292

Table 46 - Educational Attainment by Age

Data Source: 2019-2023 ACS

Educational Attainment - Median Earnings in the Past 12 Months

Educational Attainment	Median Earnings in the Past 12 Months
Less than high school graduate	$31,908
High school graduate (includes equivalency)	$41,492
Some college or Associate's degree	$51,034
Bachelor's degree	$75,308
Graduate or professional degree	$101,462

Table 47 - Median Earnings in the Past 12 Months

Data Source: 2019-2023 ACS

Based on the Business Activity table above, what are the major employment sectors within your jurisdiction?

Union County, NC is a part of the Charlotte-Concord-Gastonia, NC-SC MSA. While the County is home to industry such as healthcare and advanced technology manufacturing, almost 40% of civilian employed residents are employed outside of the County. The three (3) largest categories of jobs by industry sector in Union County are as follows:

- **Education, Health Care, and Social Assistance –** 12,972 jobs (17.0% of jobs)
- **Manufacturing –** 11,876 jobs (15.6% of jobs)
- **Construction –** 10,910 jobs (13.5% of jobs)

These three categories represent 47.0% of the total number of jobs in the County.

Describe the workforce and infrastructure needs of the business community:

The County's needs for Economic Development are:

- Support and encouragement for job creation, job retention, and training opportunities.
- Support for business and commercial growth through expansion of existing businesses and development of new businesses.
- Promotion of the development and/or redevelopment of vacant commercial and industrial properties.

Union County's economy was historically agriculture-based and still maintains that industry, but much of its land has been redeveloped into residential communities due to the population explosion in the Charlotte metropolitan area. The housing boom in Union County reflects the reality that 40% of the County's working population commutes out of the County for employment.

The County government and its economic development organizations are working toward inducing more industrial, commercial, and technological industry to locate within the County. They are especially interested in high-technology businesses that will employ residents of all education levels, from high school to advanced graduate degrees. The County works with South Piedmont Community College and Wingate University to ensure that all residents have access to high-quality job training and advanced degrees, to promote self-sufficiency and financial empowerment.

Describe any major changes that may have an economic impact, such as planned local or regional public or private sector investments or initiatives that have affected or may affect job and business growth opportunities during the planning period. Describe any needs for workforce development, business support or infrastructure these changes may create.

Union County is located seven miles southeast of Charlotte, just outside of the I-485 Beltway. The Gateway region of the County nearest to Charlotte is heavily developed with small-lot residences, multifamily housing, and commercial amenities. Its proximity to Mecklenburg County means that corporate offices are within easy reach of the City of Charlotte and Charlotte International Airport, and potential distribution locations are near both the Beltway and US 74. The central portion of the County near Monroe Executive Airport has a strong base in advanced manufacturing and has the state's highest concentration of aerospace companies. The eastern side of the County retains its agricultural heritage and additionally has added logistical businesses along the US 74 corridor.

Due to its location in the Charlotte MSA and its widespread development, Union County has a very robust broadband network. It also has an ideal location between Charlotte and Wilmington for freight service by both highway and rail, and is within a few hours of several regional cities such as Greensboro, NC and Columbia and Spartanburg, SC. These attributes and the County's strong workforce development pipeline make Union County well-suited for business growth and expansion.

However, the County needs to address physical infrastructure in order to recruit and expand businesses. In particular, the County and its partners are aware of deficiencies in its transportation network, water supply, and sewer systems. These systems are being upgraded in capacity and reliability, but further work by the County and the municipalities will be needed to provide multiple parcels of land for development.

How do the skills and education of the current workforce correspond to employment opportunities in the jurisdiction?

As of December 2025 (the last available data), the US Bureau of Labor Statistics recorded an unadjusted unemployment rate in Union County of 3.1%. During the same month, the statewide unemployment rate was 3.4% and the national rate was 4.1%. However, 32.4% of Union County residents aged 16 and over were not in the labor force (according to the 2019-2023 ACS). This is a lower level of non-participation than statewide or nationally but there is still a significant number of persons who do not or cannot work.

The 2019-2023 ACS estimates that 90.4% of Union County residents aged 25 years or over had at least a high school diploma or equivalent. Only 67.6% had taken some college coursework, 48.0% had at least an associate's degree, and 39.0% had at least a bachelor's degree. The ACS notes that of those persons 25 years or over with earnings, high school graduates earned an annual median of $42,579 in 2023 adjusted dollars while those with some college education or an associate's degree earned a median of $50,438 and those with a bachelor's degree earned a median of $70,694. It will be essential for Union County to continue promoting post-secondary education and job training to attract businesses, while also helping its residents maintain their standard of living and retain their housing.

The County's civilian employed population 16 years and over was 123,262, but only 76,151 jobs were based in Union County. The only industry in which available jobs exceeded qualified workers was the Wholesale Trade field, with 435 more jobs than workers who lived in Union County. Every other industry had a surplus of qualified workers as compared to jobs available in the County, and the imbalance was especially high in traditionally "white-collar" higher-pay positions:

- **Agriculture, Forestry, Fishing and Hunting, and Mining** - 492 workers
- **Construction -** 628 workers
- **Manufacturing** - 2,244 workers
- **Retail Trade** - 5,796 workers
- **Transportation, Warehousing and Utilities –** 3,404 workers
- **Information** - 1,813 workers
- **Finance, Insurance, and Real Estate** - 10,863 workers
- **Professional, Scientific, Management, Administration and Waste Management –** 5,511 workers
- **Education, Health Care and Social Assistance -** 10,321 workers
- **Arts, Entertainment, Accommodations and Food Services -** 2,186 workers
- **Other Services** - 3,649 workers
- **Public Administration** - 649 workers

Since Union County has a low unemployment rate for its citizens, this indicates that it serves as a bedroom community for workers whose jobs are located elsewhere. The majority of these jobs are based elsewhere in the Charlotte Metropolitan Statistical Area.

Describe any current workforce training initiatives, including those supported by Workforce Investment Boards, community colleges and other organizations. Describe how these efforts will support the jurisdiction's Consolidated Plan.

South Piedmont Community College (SPCC) serves as the primary workforce training center in Union County. SPCC offers programs in adult basic skills, high school equivalency diplomas, college credit programs, and short-term training. SPCC has several programs that help individuals gain the skills necessary to enter the workforce or re-enter the workforce for a new career pathway.

SPCC is dedicated to developing the highly skilled workforce that Union County's employers are seeking. This can include adult education and high school equivalency diplomas followed by coursework or degrees in advanced manufacturing, art and digital media, business, construction and trades, education, information technology, language, medical sciences, public safety, STEM, and transportation and logistics. The college offers skills development and certificate programs and associate degrees, and students who so choose can use this coursework as a springboard to a bachelor's degree.

Further, SPCC also has the Workforce Readiness Program, which is frequently utilized by clients of the Union County Community Shelter. The Workforce Readiness program provides education and training for individual success in the workplace. Tuition is waived for unemployed, underemployed and dislocated workers. This program helps participants with learning how to develop a resume, set up email accounts, learn how to search jobs online and apply for them, and how to use basic Microsoft Office products. Additionally, they will take a course on career planning and assessment. This is vital for many of the clients of the Homeless Shelter, as many are homeless due to aging out of the construction industry and finding themselves unemployable due to limited skill sets.

Centralina Workforce Development Board operates an NC Works Career Center in the County, located in the City of Monroe. The Career Center provides services for area residents from all backgrounds to help them maximize job searches, increase skill sets, and obtain meaningful employment. At the Career Center, job seekers have access to computers to search for job opportunities, along with access to job fairs and workshops that help connect them with employers. They can also earn their Career Readiness Certificate, a recognizable skills credential that helps job seekers find and keep a job or advance in their career. Career Centers also have valuable labor market information available to help job seekers learn more about industries that interest them, what they pay, and how they can move up in those careers.

Does your jurisdiction participate in a Comprehensive Economic Development Strategy (CEDS)?

Yes

If so, what economic development initiatives are you undertaking that may be coordinated with the Consolidated Plan? If not, describe other local/regional plans or initiatives that impact economic growth.

Union County is a member of the Centralina Economic Development District (EDD) which develops and maintains the region's CEDS. The Centralina EDD provides access to grants, data, collaborative opportunities and connections to regional economic development partners, workforce development boards and economic development organizations. It offers strategic economic development planning, technical assistance for U.S. EDA funding, regional economic and equity data, CEDS planning tools and more.

Discussion

The *Prosperity for All: Greater Charlotte Region CEDS 2023-2028* report identified three goals for the economic development of the region: 1) Expanding Economic Opportunity, 2) Building Community Supportive Infrastructure, and 3) Strengthening Regional Resilience and Global Competitiveness. The CEDS is primarily a roadmap for the public sector – local governments, county economic development organizations, workforce development boards, community colleges and universities – but relies heavily on collaboration with and ultimately action by the private sector to achieve its vision and goals. The public sector can invest in education and workforce development systems, build infrastructure and support regional collaboration and coordination on economic development policy that attracts and retains businesses. There are, however, many factors that influence economic growth and prosperity that are outside of the influence of the public sector. In this context, the CEDS creates a foundation for public policy, investment and regional collaboration to facilitate economic resilience and inclusive growth.

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MA-50 Needs and Market Analysis Discussion

Are there areas where households with multiple housing problems are concentrated? (include a definition of "concentration")

The majority of homes with any of the four housing problems (lacks complete kitchen facilities, lacks complete plumbing facilities, has more than one person per room, or has a cost burden greater than 30% of household income) are typically located in the west and southwest areas of Union County. Meanwhile, the oldest rental housing is scattered through the County, with concentrations near Waxhaw, Weddington, Marshville, and Unionville.

Are there any areas in the jurisdiction where racial or ethnic minorities or low-income families are concentrated? (include a definition of "concentration")

According to the 2019-2023 ACS data, Union County had a minority population of 32.0% of its total population (persons who are non-White and/or Hispanic or Latino). HUD defines a Minority Neighborhood as, “A neighborhood in which the percentage of persons of a particular racial or ethnic minority is at least 20 points higher than that minority's percentage in the housing market as a whole; the neighborhood's total percentage of minority persons is at least 20 points higher than the total percentage of minorities for the housing market area as a whole; or in the case of a metropolitan area, the neighborhood's total percentage of minority persons exceeds 50 percent of its population.” According to the 50% definition, there are twenty (20) Block Groups in the County that are considered a “Minority Neighborhood:”

- Census Tract 203.05, Block Group 1: 50.19% minority
- Census Tract 203.21, Block Group 1: 78.76% minority
- Census Tract 204.01, Block Group 1: 61.60% minority
- Census Tract 204.01, Block Group 2: 52.35% minority
- Census Tract 204.06, Block Group 1: 90.10% minority
- Census Tract 204.06, Block Group 2: 94.04% minority
- Census Tract 204.06, Block Group 4: 90.63% minority
- Census Tract 205.01, Block Group 1: 91.00% minority
- Census Tract 205.01, Block Group 2: 53.69% minority
- Census Tract 205.01, Block Group 3: 56.22% minority
- Census Tract 205.02, Block Group 1: 69.02% minority
- Census Tract 206.01, Block Group 1: 97.44% minority
- Census Tract 206.01, Block Group 2: 52.42% minority
- Census Tract 206.01, Block Group 4: 86.19% minority
- Census Tract 206.02, Block Group 1: 80.87% minority
- Census Tract 206.02, Block Group 3: 63.20% minority
- Census Tract 207.01, Block Group 3: 71.12% minority

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- Census Tract 207.02, Block Group 1: 56.64% minority
- Census Tract 208, Block Group 4: 68.97% minority

The County uses the HUD definition of a low-mod area as any area with a population of low- and moderate-income residents that is equal to or greater than 51% of the entire population of the area. According to this definition, 32 of the 132 Block Groups within the County are considered low-mod areas:

- Census Tract 202.05, Block Group 2: 54.7% low-mod
- Census Tract 203.07, Block Group 1: 57.5% low-mod
- Census Tract 203.08, Block Group 4: 52.7% low-mod
- Census Tract 203.12, Block Group 1: 52.6% low-mod
- Census Tract 203.21, Block Group 1: 57.3% low-mod
- Census Tract 204.01, Block Group 2: 53.6% low-mod
- Census Tract 204.03, Block Group 1: 65.2% low-mod
- Census Tract 204.03, Block Group 3: 56.4% low-mod
- Census Tract 204.05, Block Group 1: 71.3% low-mod
- Census Tract 204.06, Block Group 1: 52.8% low-mod
- Census Tract 204.06, Block Group 2: 92.4% low-mod
- Census Tract 204.06, Block Group 3: 57.4% low-mod
- Census Tract 204.06, Block Group 4: 98.1% low-mod
- Census Tract 205.01, Block Group 1: 72.3% low-mod
- Census Tract 205.01, Block Group 2: 65.8% low-mod
- Census Tract 205.02, Block Group 1: 86.0% low-mod
- Census Tract 206.01, Block Group 1: 80.1% low-mod
- Census Tract 206.01, Block Group 4: 75.7% low-mod
- Census Tract 206.02, Block Group 1: 75.1% low-mod
- Census Tract 206.02, Block Group 3: 51.2% low-mod
- Census Tract 207.01, Block Group 1: 72.2% low-mod
- Census Tract 207.01, Block Group 2: 100% low-mod
- Census Tract 207.01, Block Group 3: 61.0% low-mod
- Census Tract 207.02, Block Group 1: 51.5% low-mod
- Census Tract 207.02, Block Group 2: 60.8% low-mod
- Census Tract 208, Block Group 2: 73.3% low-mod
- Census Tract 208, Block Group 3: 65.4% low-mod
- Census Tract 208, Block Group 4: 72.8% low-mod
- Census Tract 208, Block Group 5: 59.4% low-mod
- Census Tract 209.01, Block Group 1: 59.5% low-mod
- Census Tract 209.01, Block Group 2: 70.2% low-mod
- Census Tract 210.15, Block Group 1: 54.5% low-mod

Union County has an overall low-mod percentage of 35.09%.

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What are the characteristics of the market in these areas/neighborhoods?

These areas include the oldest housing stock in the County, which tend to suffer from multiple housing problems like insufficient plumbing or kitchen facilities. These neighborhoods tend to have fewer public services such as water and sewer, may not have fast broadband available, and are often subject to flooding concerns. Often, they are either in rural areas of Union County or are in heavily commercial areas with noise issues. However, due to being less desirable, they are also the most affordable places in Union County for renters and owner-occupants.

Are there any community assets in these areas/neighborhoods?

A great deal of housing accessible to low- and moderate-income households is located in areas just outside of the City of Monroe central business district. Many public services are located within the City's central business district, including Monroe City Hall and the Union County Government Center, fire and police stations, parks, medical clinics, social service agencies and churches. Additional low-mod housing is located along the US 74 corridor, which allows easy access to shopping centers and employment. Housing units located in the incorporated towns are generally equipped with municipal water and sewer service, reducing the risks from untreated well water. For housing located in rural areas, there is open space and parkland available for recreation.

Are there other strategic opportunities in any of these areas?

All of the neighborhoods that contain target households are located in communities with local municipal authorities that support efforts to revitalize and uplift LMI households. Through the continued growth of the Union County CDBG program the County hopes to develop strategic opportunities with member governments to target these communities.

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MA-60 Broadband Needs of Housing occupied by Low- and Moderate-Income Households - 91.210(a)(4), 91.310(a)(2)

Describe the need for broadband wiring and connections for households, including low- and moderate-income households and neighborhoods.

The Federal Communication Commission defines broadband internet as connectivity to the internet with a minimum 100 Mbps download speed and 20 Mbps upload (100/20), updated in 2024 from its prior definition of 25 Mbps download and 3 Mbps upload (25/3). Union County scores within the top five counties in North Carolina in the NC Broadband Adoption Index with a score of 93.06, following Wake, Orange, and Mecklenburg Counties (home to the Cities of Raleigh, Chapel Hill and Charlotte respectively) and slightly leading Onslow County (home to US Marine Corps Camp Lejeune.)

The Index reports that 99.67% of residents of Union County had internet available with at least 25 Mbps download and 3 Mbps upload speeds, 98.77% live in an area with broadband internet available with at least 100 Mbps download and 20 Mbps upload speeds, and 80.36% of residents had a broadband subscription. In comparison, 25/3 internet service was available to 98.39% of North Carolina residents, 95.81% had access to 100/20 broadband service, and 71.6% had a broadband subscription. There were 6.18% of households in Union County without internet access and 4.54% with no computer devices, while statewide there were 11.9% households with no internet access and 8% with no computer devices.

Broadband is delivered in Union County by several technologies and speed ranges:

- Fiber Optic Cables (Typically up to 10 Gbps upload and download)
- DSL via Copper wires (1-400 Mbps download/8 Mbps upload)
- Cable via Coaxial cables (10–500 Mbps download/5-50 Mbps upload)
- Wireless: Cellular 5G (4-300 Mbps download/10-50 Mbps upload)
- Satellite (25-200 Mbps download/5-20 upload)

Speeds can vary greatly depending on internet service provider (ISP) packages, equipment and distance to local ISP facilities.

While the County does have very high adoption and availability rates, the lowest-income households (including low-income working families, seniors and persons with disabilities) are most likely to lack a reliable internet connection at home. Persons living on fixed incomes or working low wage jobs may not be able to afford the monthly payment for broadband access. Facilities such as libraries and coffee shops may provide internet access though this may be inconvenient for users.

Union County has a Broadband Committee whose purpose is to provide input on how to expand high-speed internet access to residents and businesses. The Board of County Commissioners appointed the seven members to oversee the development of a broadband plan for the County and review the

implementation of other approved recommendations in the Union County 2050 Comprehensive Plan, which identifies broadband internet as a focus area.

Describe the need for increased competition by having more than one broadband Internet service provider serve the jurisdiction

Broadband internet competition is above average in Union County, with at least eleven fixed and mobile broadband providers and four mobile providers available to most consumers. Cable and DSL are the main network options in the County. They are frequently overlapping and generally competing on service quality. Cable speed tends to be better, but the overall speeds seen with either system are comparable. Additionally, wireless 5G internet providers cover the entirety of the County with generally cheaper but less-reliable service, and gigabit fiberoptic was available to approximately a third of the County.

Noth Carolina laws do not allow local governments to own or operate an internet service provider, and prior to 2021 county governments largely were not involved in broadband funding. Hower, in recent years Union County has been among the local governments actively pursuing funding opportunities to expand high-speed internet access in the community. These funding sources have included the Rural Digital Opportunity Fund, the Growing Rural Economies with Access to Technology (GREAT) Program, the Completing Access to Broadband (CAB) Program, the Stop-Gap Program to address gaps in GREAT and CAB funding, and the Broadband Equity, Access, and Deployment (BEAD) Program. Additional funds may be available through the North Carolina Broadband Infrastructure Office's Building a New Digital Economy (BAND-NC) Program. This provides rapid-response innovation mini-grants to NC communities to fund local digital inclusion projects that meet specific community needs, including internet access, devices that meet their needs, and the ability to safely use them.

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MA-65 Hazard Mitigation - 91.210(a)(5), 91.310(a)(3)

Describe the jurisdiction's increased natural hazard risks associated with climate change.

Per the introduction to the Cabarrus Stanly Union Regional Hazard Mitigation Plan, 2020 Update:

Natural hazards, such as thunderstorms, winter storms, floods, and tornadoes, are a part of the world around us. Their occurrence is natural and inevitable, and there is little we can do to control their force and intensity. We must consider these hazards to be legitimate and significant threats to human life, safety, and property.

The Cabarrus Stanly Union Region is located in the western Piedmont of North Carolina and includes the counties of Cabarrus, Stanly, and Union and the municipal governments within those counties. This area is vulnerable to a wide range of natural hazards, most notably: tornadoes and thunderstorms, flooding, and severe winter weather. It is also vulnerable to human-caused hazards, such as hazardous substance releases and cyber-attacks. These hazards threaten the life and safety of residents in the region and have the potential to damage or destroy both public and private property, disrupt the local economy, and impact the overall quality of life of individuals who live, work, and vacation in the region.

While the threat from hazardous events may never be fully eliminated, there is much we can do to lessen their potential impact upon our community and our citizens. By minimizing the impact of hazards upon our built environment, we can prevent such events from resulting in disasters. The concept and practice of reducing risks to people and property from known hazards is generally referred to as "hazard management".

The Plan goes on to describe the planning process for this plan, the community profile, the risk assessment (consisting of hazard identification, hazard profiles, and vulnerability assessment), the capability assessment, the Region's proposed mitigation strategy and action plan, and the means for maintaining the plan.

Describe the vulnerability to these risks of housing occupied by low- and moderate-income households based on an analysis of data, findings, and methods.

The Cabarrus Stanly Union Regional Hazard Mitigation Plan was updated in 2020, and focused on organizing community resources, identifying, and accessing hazard risks, and determining how to best minimize or manage those risks to save lives, property and speed recovery following natural disasters. This process allows for pre-disaster investments that have the potential to significantly reduce the demand for post disaster assistance.

The Federal Emergency Management Agency (FEMA) National Risk Index rates Union County as having a relatively moderate expected annual loss due to disaster, estimated at $110,331,117.72 in losses to buildings, population equivalence, and agricultural value. Inland Flooding is a relatively high risk factor as

about 6.3% of Union County lies within the 1%-Annual-Chance (100-year) Floodplain, primarily near tributaries to the Rocky and Catawba Rivers, but only 64.2% of households in one of the County's 1%-Annual-Chance Special Flood Hazard Areas maintain flood insurance. Other major risk factors include tornadoes, hurricanes, and drought. The low to moderate income population is most vulnerable to these potential disasters because they have less access to resources to make necessary repairs after a disaster and they are more likely to live in substandard housing that may not withstand potential natural or manmade disasters.

Disasters affect everyone in a given area, but they tend to have a much greater effect on vulnerable populations such as low- or moderate-income households, homeless persons, elderly persons or persons with disabilities, or persons who have less than proficient English skills. Many households are uninsured or underinsured, especially low- and moderate-income renters who often have to live in houses or apartments that are more vulnerable to damage such as flooding or fire. Beyond insurance, households across the country are increasingly unlikely to have enough savings for unexpected damages. A loss of water or power would be a major inconvenience for many households but can endanger the health of an elderly or disabled person during extremely hot or cold weather. Likewise, extreme weather can pose immediate risk to unhoused persons. Persons who do not speak English well can have difficulty obtaining both emergency and long-term assistance.

Cabarrus, Stanly, and Union Counties work with the North Carolina state government and Federal governments to ameliorate natural and manmade disasters. They jointly conduct prevention efforts such as education about the need for insurance and a plan for disaster awareness, and they respond to disasters in a way that includes both lower- and higher-income residents. Further outreach is needed for the most vulnerable persons to ensure they have safe and sound housing, reliable access to necessities, and a support structure even in severe conditions.

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Strategic Plan

SP-05 Overview

Strategic Plan Overview

Union County's Consolidated Plan outlines goals and strategies that parallel the County's 2050 Comprehensive Plan. The 2050 Plan contains community goals, policies, and strategies, that lay the foundation of principles that will allow for creating a more livable and vibrant community that will offer new employment opportunities, improved public facilities and services, more housing choices and ultimately higher quality of life for residents. This alignment of plans will ensure coordination of current and future municipal efforts and will allow for leveraging resources targeted towards growing Union County.

The Consolidated Plan outlines goals and strategies that will be pursued over the next five years with CDBG funds. All CDBG-funded projects, except for program administration and planning activities, must meet one of three HUD defined National Objectives:

- Benefit to low and moderate income (LMI) persons: Requires recipients to spend at least 70% of their CDBG funds to meet LMI national objective.
- Aid in the prevention or elimination of slums or blight.
- Meet urgent needs to alleviate emergency conditions.

The goals in this plan represent both high and low priority needs for Union County and will serve as the basis for the strategic actions the County will implement over the five-year planning period to meet the needs of the community. High priorities are those identified by the community and municipal partners as the most important activities as they generally have a larger, more regional impact. These high priority goals will be supported with CDBG funding to the greatest extent possible. Low priorities are areas where the County and its partners recognize there are needs, but where current institutional delivery systems with dedicated resources currently exist to fill these needs. Therefore, due to the limited CDBG funding, low priority goals will only receive CDBG funds if excess funds are available. As Union County lays the foundation for the CDBG program, it is anticipated that in future Consolidated Plans assistance may be available to support all of the goal areas outlined in the Plan.

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SP-10 Geographic Priorities - 91.215 (a)(1)

Geographic Area

1.	**Area Name:**	**Union County CDBG Program Area**
	Area Type:	County-Wide Low-Mod
	Other Target Area Description:	Strategy area
	HUD Approval Date:	7/1/2016
	% of Low/ Mod:	100%
	Revital Type:	Comprehensive
	Other Revital Description:	-
	Identify the neighborhood boundaries for this target area.	Union County.
	Include specific housing and commercial characteristics of this target area.	Union County is located on the eastern edge of the Charlotte, NC MSA. Suburban small-lot single-family housing predominates in western Union County and its municipalities, while the eastern half of the County has more large-lot single-family residences, agricultural users & undeveloped land. Commercial and industrial development is concentrated along the US 74 and US 74 Bypass highways, particularly between the City of Monroe and the Interstate 485 Beltway.
	How did your consultation and citizen participation process help you to identify this neighborhood as a target area?	Stakeholders and residents identified needs during consultations and the citizen participation process.
	Identify the needs in this target area.	New housing construction, infrastructure improvements, improved public services, residential rehabilitation, and economic development.
	What are the opportunities for improvement in this target area?	There are many community resources and social services in the County, and its location on a major highway allows for business expansion and residential development.
	Are there barriers to improvement in this target area?	Homeownership and housing rehabilitation is out of financial reach for low- and moderate-income households, there is a lack of high-paying jobs in the community, and the lowest income households are not keeping pace financially with rising housing costs.

Table 48 - Geographic Priority Areas

General Allocation Priorities

Describe the basis for allocating investments geographically within the jurisdiction (or within the EMSA for HOPWA)

Union County is home to fourteen municipalities and of those, nine municipalities have chosen to participate in the CDBG program: Waxhaw, Weddington, Stallings, Indian Trail, Mineral Springs and Wesley Chapel to the west; Fairview in the northern portion of the County; and Wingate and Marshville in eastern Union County. The municipalities of Hemby Bridge, Lake Park, Marvin, Monroe and Unionville have chosen to not participate in the CDBG program during FY 2026.

Union County has not established specific target areas to focus the investment of CDBG funds. In terms of specific geographic distribution of investments, infrastructure improvements and public facilities will be focused primarily in areas with concentrations of low- and moderate-income populations. CDBG funds will be used in those areas of the County whose population is over 51% low- and moderate-income. At least 70% of all the County's CDBG funds will be used for activities which principally benefit low- and moderate-income persons.

Several criteria will be considered in making project allocations:

- The severity of the need;
- The availability of other funds to ensure project viability;
- How the project met national CDBG objectives and goals;
- How well the project addressed local needs; and
- How large the impact will be for residents (i.e., the number of beneficiaries.)

At least 70% of the County's CDBG funds are budgeted to activities that principally benefit low- and moderate-income persons. The following guidelines for allocating HUD funding will be used for the FY 2026-2030 Five-Year Consolidated Plan:

- Public services activities either serve clientele who are low- and moderate-income or in certain cases, limited clientele who are presumed to be low- and moderate-income such as the elderly or disabled.
- Public facilities activities are either located in a low- and moderate-income census tract/block group or have a low- and moderate-income service area benefit or clientele over 51% low- and moderate-income.
- Acquisitions and demolition activities are either located in a low- and moderate-income census area or are activities which are eligible by preventing or eliminating slums and blight on a spot basis or area basis.
- Housing activities have income eligibility criteria and are considered direct benefit as the beneficiary must be income eligible. Applicants can be from throughout the County.

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- Economic development projects will be located in a low- and moderate-income block group or a block group having greater than 20% poverty, be part of a redevelopment plan, or create jobs where at least 51% are available to low- and moderate-income residents.

According to the 2019-2023 ACS data, Union County had a minority population of 32.0% of its total population (persons who are non-White and/or Hispanic or Latino). HUD defines a Minority Neighborhood as, "A neighborhood in which the percentage of persons of a particular racial or ethnic minority is at least 20 points higher than that minority's percentage in the housing market as a whole; the neighborhood's total percentage of minority persons is at least 20 points higher than the total percentage of minorities for the housing market area as a whole; or in the case of a metropolitan area, the neighborhood's total percentage of minority persons exceeds 50 percent of its population."

According to the 50% definition, there are twenty (20) Block Groups in the County that are considered a "Minority Neighborhood:"

- Census Tract 203.05, Block Group 1: 50.19% minority
- Census Tract 203.21, Block Group 1: 78.76% minority
- Census Tract 204.01, Block Group 1: 61.60% minority
- Census Tract 204.01, Block Group 2: 52.35% minority
- Census Tract 204.06, Block Group 1: 90.10% minority
- Census Tract 204.06, Block Group 2: 94.04% minority
- Census Tract 204.06, Block Group 4: 90.63% minority
- Census Tract 205.01, Block Group 1: 91.00% minority
- Census Tract 205.01, Block Group 2: 53.69% minority
- Census Tract 205.01, Block Group 3: 56.22% minority
- Census Tract 205.02, Block Group 1: 69.02% minority
- Census Tract 206.01, Block Group 1: 97.44% minority
- Census Tract 206.01, Block Group 2: 52.42% minority
- Census Tract 206.01, Block Group 4: 86.19% minority
- Census Tract 206.02, Block Group 1: 80.87% minority
- Census Tract 206.02, Block Group 3: 63.20% minority
- Census Tract 207.01, Block Group 3: 71.12% minority
- Census Tract 207.02, Block Group 1: 56.64% minority
- Census Tract 208, Block Group 4: 68.97% minority

The County uses the HUD definition of a low-mod area as any area with a population of low- and moderate-income residents that is equal to or greater than 51% of the entire population of the area. According to this definition, 32 of the 132 Block Groups within the County are considered low-mod areas:

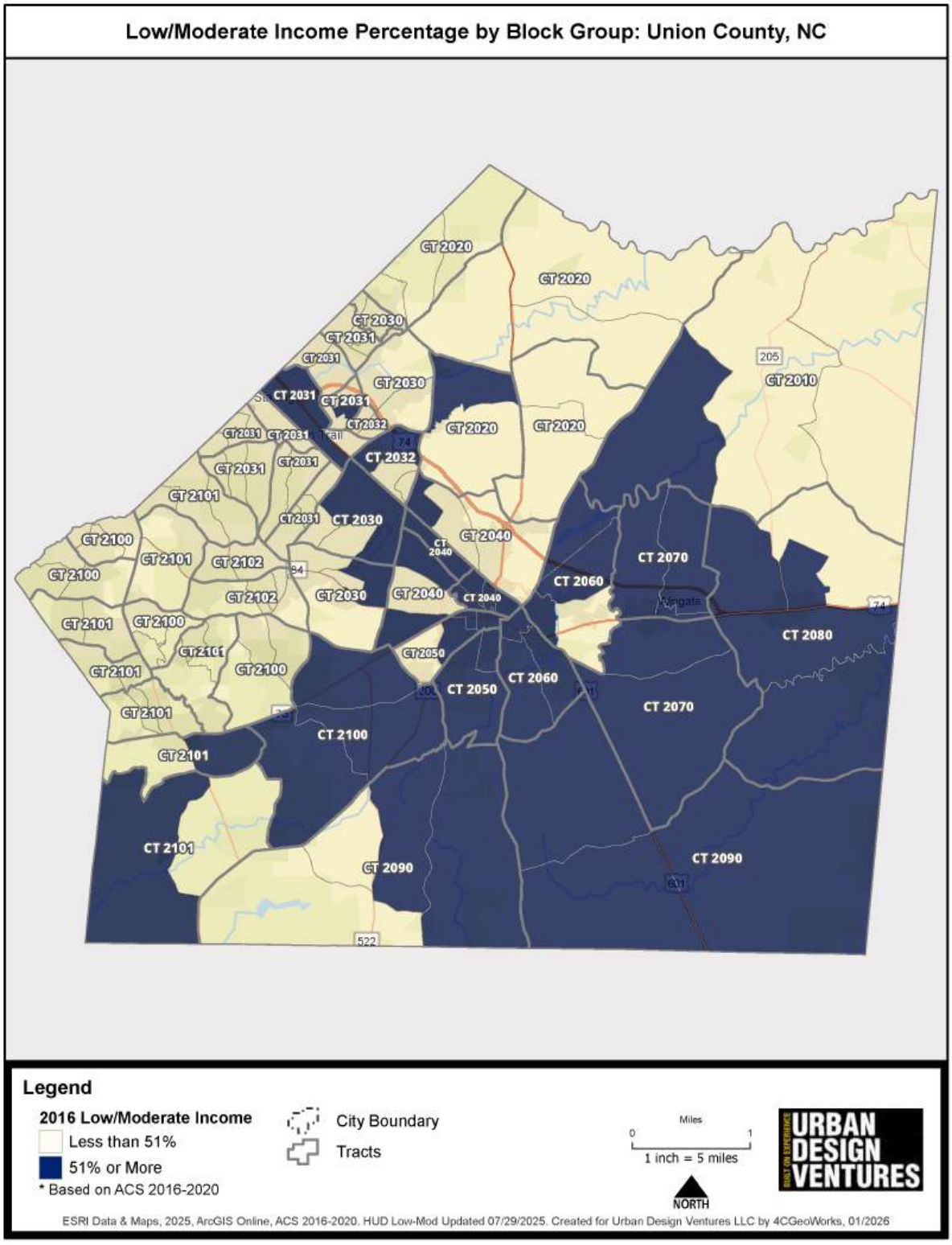
- Census Tract 202.05, Block Group 2: 54.7% low-mod
- Census Tract 203.07, Block Group 1: 57.5% low-mod

- Census Tract 203.08, Block Group 4: 52.7% low-mod
- Census Tract 203.12, Block Group 1: 52.6% low-mod
- Census Tract 203.21, Block Group 1: 57.3% low-mod
- Census Tract 204.01, Block Group 2: 53.6% low-mod
- Census Tract 204.03, Block Group 1: 65.2% low-mod
- Census Tract 204.03, Block Group 3: 56.4% low-mod
- Census Tract 204.05, Block Group 1: 71.3% low-mod
- Census Tract 204.06, Block Group 1: 52.8% low-mod
- Census Tract 204.06, Block Group 2: 92.4% low-mod
- Census Tract 204.06, Block Group 3: 57.4% low-mod
- Census Tract 204.06, Block Group 4: 98.1% low-mod
- Census Tract 205.01, Block Group 1: 72.3% low-mod
- Census Tract 205.01, Block Group 2: 65.8% low-mod
- Census Tract 205.02, Block Group 1: 86.0% low-mod
- Census Tract 206.01, Block Group 1: 80.1% low-mod
- Census Tract 206.01, Block Group 4: 75.7% low-mod
- Census Tract 206.02, Block Group 1: 75.1% low-mod
- Census Tract 206.02, Block Group 3: 51.2% low-mod
- Census Tract 207.01, Block Group 1: 72.2% low-mod
- Census Tract 207.01, Block Group 2: 100% low-mod
- Census Tract 207.01, Block Group 3: 61.0% low-mod
- Census Tract 207.02, Block Group 1: 51.5% low-mod
- Census Tract 207.02, Block Group 2: 60.8% low-mod
- Census Tract 208, Block Group 2: 73.3% low-mod
- Census Tract 208, Block Group 3: 65.4% low-mod
- Census Tract 208, Block Group 4: 72.8% low-mod
- Census Tract 208, Block Group 5: 59.4% low-mod
- Census Tract 209.01, Block Group 1: 59.5% low-mod
- Census Tract 209.01, Block Group 2: 70.2% low-mod
- Census Tract 210.15, Block Group 1: 54.5% low-mod

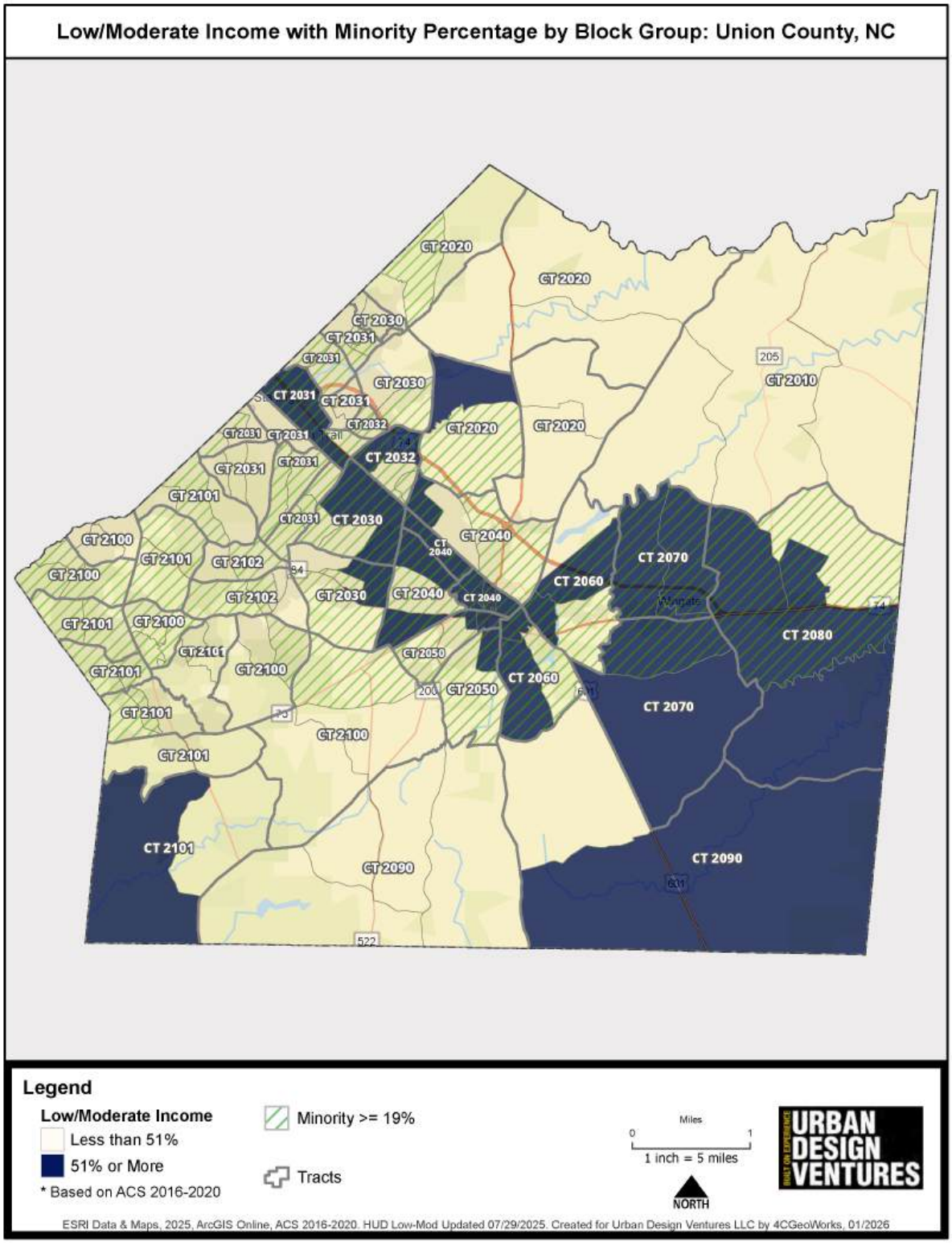
Union County has an overall low-mod percentage of 35.09%.

Below are maps of Union County's Low/Moderate Income Percentage by Block Group, Low/Moderate Income with Minority Percentage by Block Group, and Percent of Households with Income Below Poverty Level by Block Group.

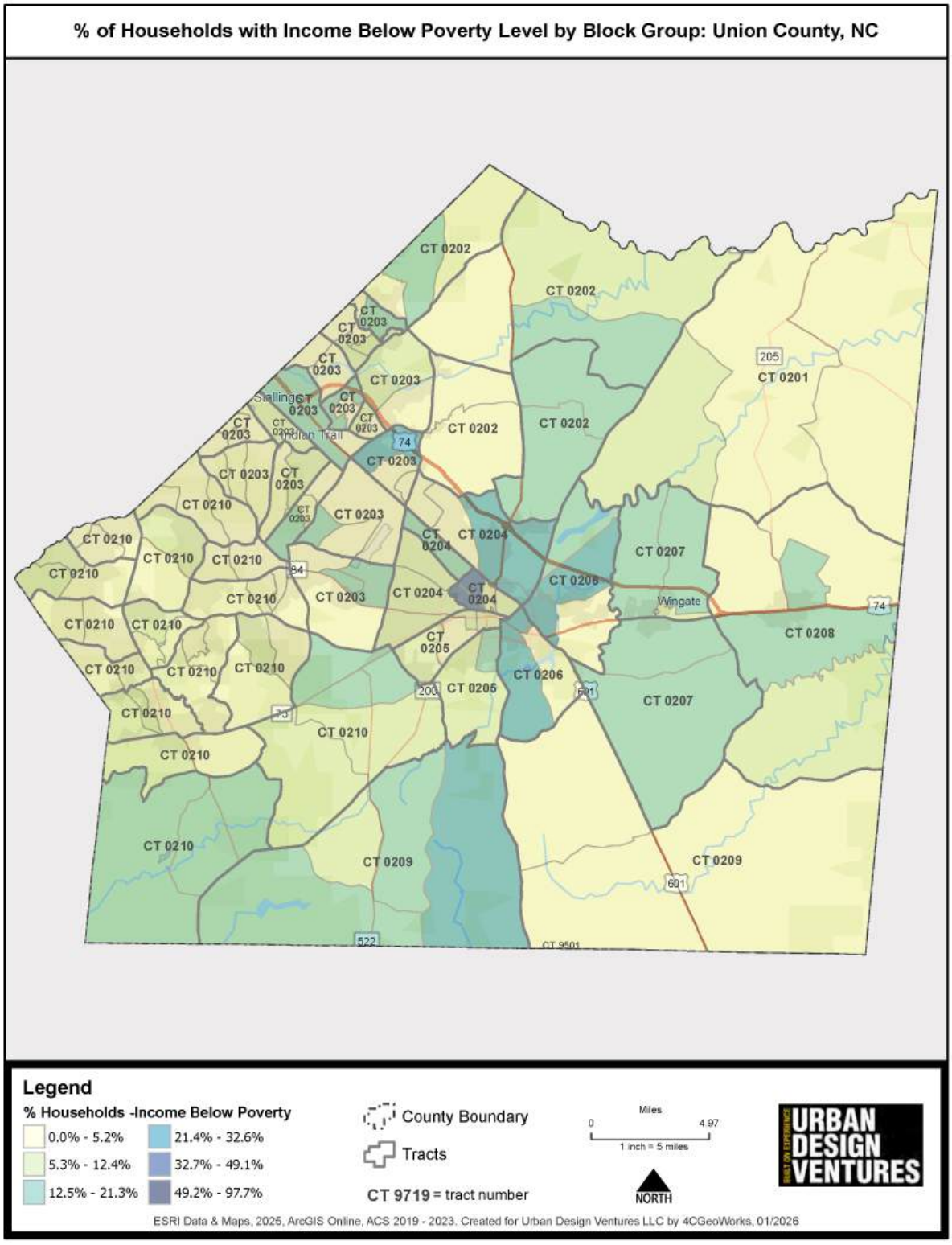
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Low/Moderate Income Percentage by Block Group



Low/Moderate Income with Minority Percentage by Block Group



Percent of Households with Income Below Poverty Level by Block Group

SP-25 Priority Needs - 91.215(a)(2)

Priority Needs

1.	Priority Need Name	Housing Priority (HS)
	Priority Level	High
	Population	Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents
	Geographic Areas Affected	County-wide
	Associated Goals	HS-1 Housing Rehabilitation HS-2 Housing Construction HS-3 Homeownership HS-4 Housing Assistance HS-5 Fair Housing
	Description	There is a need to increase the supply of affordable, decent, safe, and sanitary housing for homebuyers, owners, and renters, and to protect their housing rights.
	Basis for Relative Priority	This priority was determined through consultation with residents as well as public, nonprofit, and private entities.
2.	**Priority Need Name**	**Homeless Priority (HO)**
	Priority Level	High
	Population	Extremely Low Low Moderate Large Families Families with Children Elderly Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse

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		Veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth
	Geographic Areas Affected	County-wide
	Associated Goals	HO-1 Housing Opportunities HO-2 Support and Management Services HO-3 Homelessness Prevention HO-4 Permanent Supportive Housing HO-5 Shelter Housing
	Description	There is a need for services and housing opportunities for persons and families who are homeless or at risk of becoming homeless.
	Basis for Relative Priority	This priority was determined through consultation with residents as well as public, nonprofit, and private entities.
3.	**Priority Need Name**	**Other Special Needs Priority (SN)**
	Priority Level	High
	Population	Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development
	Geographic Areas Affected	County-wide
	Associated Goals	SN-1 Housing SN-2 Accessibility SN-3 Social Services SN-4 Removal of Architectural Barriers

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	Description	There is a need to increase housing opportunities, services, and facilities for persons with special needs.
	Basis for Relative Priority	This priority was determined through consultation with residents as well as public, nonprofit, and private entities.
4.	**Priority Need Name**	**Community Development Priority (CD)**
	Priority Level	High
	Population	Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Non-housing Community Development
	Geographic Areas Affected	County-wide
	Associated Goals	CD-1 Community Facilities CD-2 Infrastructure CD-3 Public Services CD-4 Nutritional Services CD-5 Public Safety CD-6 Clearance/Demolition CD-7 Transportation
	Description	There is a need to upgrade and improve community facilities, infrastructure, and public services, in order to revitalize socially and economically distressed areas of the County and to improve the quality of life for County residents.
	Basis for Relative Priority	This priority was determined through consultation with residents as well as public, nonprofit, and private entities.
5.	**Priority Need Name**	**Economic Development Priority (ED)**
	Priority Level	Low

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	Population	Extremely Low Low Moderate Large Families Families with Children Elderly Non-Housing Community Development
	Geographic Areas Affected	County-wide
	Associated Goals	ED-1 Employment ED-2 Development ED-3 Redevelopment ED-4 Financial Assistance
	Description	There is a need to increase employment, workforce development, self-sufficiency, educational training, and empowerment for residents of the County.
	Basis for Relative Priority	This priority was determined through consultation with residents as well as public, nonprofit, and private entities.
6.	**Priority Need Name**	**Administration, Planning, and Management Priority (AM)**
	Priority Level	High
	Population	Non-housing Community Development
	Geographic Areas Affected	County-wide
	Associated Goals	AM-1 Overall Coordination AM-2 Fair Housing
	Description	There is a need for planning, administration, management, and oversight of Federal, State, and local funded programs to address the housing, community development and economic development needs.
	Basis for Relative Priority	The County needs to ensure Federal funds are being properly spent to maximize the positive impact of CDBG and any potential additional HUD grants.

Table 49 - Priority Needs Summary

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Narrative (Optional)

The priority ranking of needs for housing, homelessness, other special needs, community development, economic development, and administration are as follows:

- **High Priority** - Activities are assigned a high priority if the County expects to fund them during the Five-Year Consolidated Plan period.
- **Low Priority** - Activities are assigned a low priority if the activity may not be funded by the County during the Five-Year Consolidated Plan period. The County may support applications for other funding if those activities are consistent with the needs identified in the Five-Year Consolidated Plan.

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SP-30 Influence of Market Conditions - 91.215 (b)

Influence of Market Conditions

Affordable Housing Type	Market Characteristics that will influence the use of funds available for housing type
Tenant Based Rental Assistance (TBRA)	Union County has experienced increasing rents and decreasing housing availability, and this places cost burdens on residents. The County will consider offering Tenant Based Rental Assistance (TBRA) depending on need and funding availability.
TBRA for Non-Homeless Special Needs	Union County's population is aging and will require accessible housing that is affordable to persons with low or fixed incomes. The County will consider offering Tenant Based Rental Assistance (TBRA) depending on need and funding availability.
New Unit Production	There is a limited supply of affordable housing units in Union County. There is a need to construct additional housing units for rent and for sale.
Rehabilitation	There is a limited supply of affordable housing units in Union County. Additionally, many of those units are in poor condition. There is a need to rehabilitate existing housing units for rent and for sale
Acquisition, including preservation	There is a limited supply of affordable housing units in Union County. There are vacant dilapidated houses and sites that could be acquired and rehabilitated to meet the demand for affordable housing. This may include the use of historic preservation or economic development funding.

Table 50 - Influence of Market Conditions

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SP-35 Anticipated Resources - 91.215(a)(4), 91.220(c)(1,2)

Introduction

Union County anticipates that it will receive $843,937 in CDBG grant funding for the FY 2026 program year between July 1, 2026, and June 30, 2027. However, rapidly evolving Federal funding priorities make it difficult to forecast if Union County will experience an increase or decrease in year-over-year CDBG funding. To ensure it does not exceed potential Federal funding, the County will anticipate a 5% cut in funds each year during the FY 2026-2030 Five-Year Consolidated Plan period. The following represents Union County's anticipated resources for the upcoming five Federal fiscal years:

- FY 2026: $843,937.00 CDBG Funds
- FY 2027: $801,740.00 CDBG Funds
- FY 2028: $759,543.00 CDBG Funds
- FY 2029: $717,346.00 CDBG Funds
- FY 2030: $675,150.00 CDBG Funds

Total: $3,797,716.00 CDBG Funds

The accomplishments of projects/activities funded during FY 2026 will be reported in the FY 2026 Consolidated Annual Performance and Evaluation Report (CAPER).

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Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of Con Plan: $	Narrative Description
			Annual Allocation: $	Program Income: $	Prior Year Resources: $	Total: $		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	$843,937	$0	$0	$843,937	$2,953,779	Four years of funding at 5% reduced level each year.

Table 51 - Anticipated Resources

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

While there are no federal match requirements for CDBG funds, Union County highly recommends that organizations provide matching funds if possible. Match fund sources include contributions derived from other eligible federal and nonfederal sources and the value of third-party in-kind contributions, (i.e., volunteers, personnel, office space, materials, equipment, and supplies). Matching funds are not required, but applications will receive favorable scoring based on leveraging funds.

The following are some of the available funding resources available to leverage and supplement CDBG funding which can address needs identified in the Consolidated Plan:

- The Community Shelter of Union County receives Emergency Solutions Grant (ESG) funding through the NC-503 North Carolina Balance of State Continuum of Care (BOSCoC). The CoC may also distribute funding through the HUD Housing Opportunities for Persons with AIDS (HOPWA) program, though the County does not anticipate any HOPWA-funded projects during the upcoming Five Year period.
- Turning Point, Inc. receives a grant from within the Administration for Children and Families, a division of the U.S. Department of Health and Human Services. It also receives state, local, and nonprofit funding, including regular financial support from the Union County government.

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- The Monroe Housing Authority administers Section 8 Housing Choice Vouchers and is allocated Project-Based Vouchers for use at its nonprofit affiliate Community Advancement & Redevelopment Enterprise, which operates the former MHA public housing units for low- and moderate-income households.
- Union County receives various sources of funding for land banking, stream restoration, and conservation from programs such as the NC Land and Water Fund, the North Carolina Parks and Recreation Trust Fund, the NC Agricultural Development and Farmland Preservation Trust Fund, the USDA Agricultural Conservation Easement Program, the Land and Water Conservation Fund, and the Regional Conservation Partnership Program.
- The County will continue to support and encourage new economic development through local, state, and Federal tax incentives and programs such as Tax Incremental Financing (TIF), Local Economic Revitalization Tax Assistance (LERTA), Enterprise Zones/Entitlement Communities, Section 108 Loan Guarantees, Economic Development Initiative (EDI) funds, Opportunity Zones, Congressionally Directed Spending, etc.
- Private developers in the County often contribute cash or in-kind improvements to housing and industrial projects that are partially funded by the Union County CDBG entitlement.
- As appropriate, the County and its subrecipients may access other forms of matching funds including private donations, foundational grants, and specialized government programs.

If appropriate, describe publicly owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

Not Applicable.

Discussion

With limited resources available to address the needs identified in the Five-Year Consolidated Plan, the County works cooperatively with private, public, and non-profit partners to address the identified needs.

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SP-40 Institutional Delivery Structure - 91.215(k)

Explain the institutional structure through which the jurisdiction will carry out its consolidated plan including private industry, non-profit organizations, and public institutions.

Responsible Entity	Responsible Entity Type	Role	Geographic Area Served
Union County	Government agency	Affordable housing – ownership Affordable housing – rental Non-homeless special needs Community development: public facilities Community development: neighborhood improvements Community development: public services Community development: economic development Planning	Jurisdiction
Monroe Housing Authority	PHA	Public housing	Jurisdiction
Community Shelter of Union County	Regional organization Nonprofit organization Subrecipient	Homelessness Non-homeless special needs Planning	Jurisdiction

Table 52 - Institutional Delivery Structure

Assessment of Strengths and Gaps in the Institutional Delivery System

Union County features suburban developments, small towns, and rural areas. The majority of the human services support system is based either in the City of Monroe or in neighboring counties. Area human service organizations regularly communicate their strengths and needs with each other through Thrive! Union, and some operate within HMIS. This formal and informal collaboration helps organizations as well as client service delivery.

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Availability of services targeted to homeless persons and persons with HIV and mainstream services

Homelessness Prevention Services	Available in the Community	Targeted to Homeless	Targeted to People with HIV
Homelessness Prevention Services			
Counseling/Advocacy	X		
Legal Assistance	X		
Mortgage Assistance	X		
Rental Assistance	X	X	X
Utilities Assistance	X	X	
Street Outreach Services			
Law Enforcement	X		
Mobile Clinics			
Other Street Outreach Services		X	
Supportive Services			
Alcohol & Drug Abuse	X		
Child Care	X		
Education	X		
Employment and Employment Training	X	X	
Healthcare	X		
HIV/AIDS	X	X	X
Life Skills	X		
Mental Health Counseling	X		
Transportation	X		
Other			
Other			

Table 53 - Homeless Prevention Services Summary

Describe how the service delivery system including, but not limited to, the services listed above meet the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth)

Homeless services in Union County can be accessed through the Community Shelter of Union County's coordinated entry. The Community Shelter is the front door for all services related to homelessness and Turning Point is the front door for all services related to domestic violence. Both agencies provide emergency services including shelter stays for those in need. The Community Shelter operates several housing programs that are available to anyone in Union County experiencing homelessness. The Community Shelter housing services are Rapid Rehousing models which include housing search services in addition to financial assistance for moving costs and short-term or long-term rental assistance, utility

deposit assistance, and case management services for twelve months post-housing. Each household assisted develops an individualized plan to address their needs in partnership with their housing case manager.

Vulnerable populations such as the chronically homeless, families with children, unaccompanied youth, and persons with HIV/AIDS receive case management for health care, mental wellness, housing assistance, and job training. As it is easier to stay out of homelessness than to exit homelessness once entered, social service providers also provide case management to at-risk individuals and families.

Describe the strengths and gaps of the service delivery system for special needs population and persons experiencing homelessness, including, but not limited to, the services listed above

According to the NC-503 Point-in-Time count conducted on the night of January 29, 2025, 177 persons were experiencing homelessness in Union County. While most homeless persons in the Charlotte MSA reside in Mecklenburg County or the City of Charlotte proper, Union County does have a significant unhoused population. This consists of both transient homeless persons along the US 74 corridor (often migrant workers seeking seasonal work) and long-term residents who have insufficient housing. For transient unhoused persons in particular, it is difficult to determine accurate numbers for how many people experience homelessness, how long a person has been homeless, and how many days they experience homelessness in a year. Based on the Point in Time (PIT) Survey, the Housing Inventory Count (HIC), and interviews with stakeholders, there is a need for additional year-round shelter space throughout the County. especially for subgroups like women, families with children, persons with mental and physical health concerns, and the chronically homeless.

The following goals and objectives for Union County's Homeless Priority have been identified for the five-year period of FY 2026 through FY 2030.

- **HO-1 Housing Opportunities** - Increase housing opportunities and living conditions for persons and families who are homeless or who are at risk of becoming homeless.
- **HO-2 Support and Management Services** - Promote and assist supportive and management services for public and non-profit agencies and organizations which assist persons who are homeless or who are at risk of becoming homeless.
- **HO-3 Homelessness Prevention** - Promote and assist in anti-eviction activities and work to resolve unfair housing practices which may contribute to homelessness.
- **HO-4 Permanent Supportive Housing** - Promote and assist in the development of new permanent supportive housing opportunities for persons and families who are experiencing homelessness and who are exiting shelters and transitional housing programs.
- **HO-5 Shelter Housing** - Support and assist in the development of shelters and supportive training and educational programs for sheltered residents.

Based on the 2019-2023 ACS data, a total of 22,541 Union County civilian noninstitutionalized residents (9.2% of the population) have at least one disability and 31,636 residents (13.0%) are age 65 and over. Of

the elderly population, 9,525 residents (3.9% of the County's total) are "frail elderly" who have at least one disability. It is expected that these populations will increase during the FY 2026-2030 Five-Year Consolidated Plan period. There will be a need to increase housing opportunities, services, and facilities for persons with special needs.

The following goals and objectives for Union County's Other Special Needs Priority have been identified for the five-year period of FY 2026 through FY 2030.

- **SN-1 Housing -** Increase the number of decent, safe, sound, sanitary, accessible and affordable units that are available and accessible to all sectors of the special needs populations.
- **SN-2 Accessibility -** Promote and assist in making accessibility improvements to existing housing units, including making reasonable accommodations for the physically disabled so they can continue to remain in their homes.
- **SN-3 Social Services -** Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.
- **SN-4 Removal of Architectural Barriers -** Remove architectural barriers which restrict the mobility and access to public facilities and services for persons with physical disabilities.

Provide a summary of the strategy for overcoming gaps in the institutional structure and service delivery system for carrying out a strategy to address priority needs

There is an ever-increasing demand for services due to factors such as lack of employment opportunities, increasing cost of housing, persistent mental health and substance abuse challenges, and reductions in funding. Union County supports its homeless and at-risk population by working with its existing provider network. To strengthen this network, the County continues to participate in regional planning groups and forums such as Thrive! Union to foster collaboration with government agencies, nonprofit organizations, and other private and public service providers. This helps the County and its partners identify common goals and strategies to avoid overlaps in services and programs and identify potential for leveraging resources to close the needs gap.

The County's strategy for developing institutional structure includes the following:

- **HO-2 Support and Management Services** - Promote and assist supportive and management services for public and non-profit agencies and organizations which assist persons who are homeless or who are at risk of becoming homeless.
- **SN-3 Social Services -** Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.

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- **CD-3 Public Services** - Improve and enhance public services and programs for youth, the elderly, persons with disabilities, and general social/welfare public service programs for low- and moderate-income County residents.
- **AM-1 Overall Coordination** - Provide program management and oversight for the successful administration of Federal, State, and locally funded programs, including planning services for special studies, annual action plans, five-year consolidated plans, substantial amendments, consolidated annual performance and evaluation reports (CAPER), environmental reviews and clearances, fair housing, and compliance with all Federal, State, and local laws and regulations.

The strategy is based on information derived from the gaps/priorities identified initially through the work of the North Carolina Coalition to End Homelessness and refined through discussions with public and private stakeholders.

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SP-45 Goals Summary - 91.215(a)(4)

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1.	HS-1 Housing Rehabilitation	2026	2030	Affordable Housing	County-wide	Housing Priority	CDBG: $1,519,088.00	Rental units rehabilitated: 0 Housing Units Homeowner housing rehabilitated: 50 Housing Units
2.	HS-2 Housing Construction	2026	2030	Affordable Housing	County-wide	Housing Priority	CDBG: $0.00	Rental units constructed: 0 Housing Units Homeowner housing added: 0 Housing Units Public Facility or Infrastructure activities for Low-/Moderate-Income Housing benefit: 0 Households Assisted
3.	HS-3 Homeownership	2026	2030	Affordable Housing	County-wide	Housing Priority	CDBG: $0.00	Direct financial assistance to homebuyers: 0 Homebuyers assisted
4.	HS-4 Housing Assistance	2026	2030	Affordable Housing	County-wide	Housing Priority	CDBG: $0.00	Tenant-based rental assistance/Rapid rehousing: 0 Households assisted

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
5.	HS-5 Fair Housing	2026	2030	Affordable Housing	County-wide	Housing Priority	CDBG: $0.00	Public service activities for low-/moderate-income housing benefit: 0 Households assisted
6.	HO-1 Housing Opportunities	2026	2030	Homeless	County-wide	Homeless Priority	CDBG: $0.00	Homeless person overnight shelter: 0 Persons assisted
7.	HO-2 Support and Management Services	2026	2030	Homeless	County-wide	Homeless Priority	CDBG: $0.00	Public service activities for Low/Moderate Income Housing Benefit: 0 Households Assisted
8.	HO-3 Homeless Prevention	2026	2030	Homeless	County-wide	Homeless Priority	CDBG: $0.00	Homelessness prevention: 0 Persons assisted
9.	HO-4 Permanent Supportive Housing	2026	2030	Homeless	County-wide	Homeless Priority	CDBG: $0.00	Housing for homeless added: 0 Household housing units
10.	HO-5 Shelter Housing	2026	2030	Homeless	County-wide	Homeless Priority	CDBG: $0.00	Overnight/Emergency shelter/Transitional housing beds added: 0 Beds

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
11.	SN-1 Housing	2026	2030	Non-Homeless Special Needs	County-wide	Other Special Needs Priority	CDBG: $0.00	HIV/AIDS housing operations: 0 Household housing units Housing for people with HIV/AIDS added: 0 Household housing units
12.	SN-2 Accessibility	2026	2030	Non-Homeless Special Needs	County-wide	Other Special Needs Priority	CDBG: $0.00	Rental units rehabilitated: 0 Housing units Homeowner housing rehabilitated: 0 Housing units
13.	SN-3 Social Services	2026	2030	Non-Homeless Special Needs	County-wide	Other Special Needs Priority	CDBG: $191,655.00	Public service activities other than low-/moderate-income housing benefit: 200 Persons Assisted
14.	SN-4 Removal of Architectural Barriers	2026	2030	Non-Homeless Special Needs	County-wide	Other Special Needs Priority	CDBG: $0.00	Public facility or infrastructure activities other than low-/moderate-income housing benefit: 0 Persons assisted

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
15.	CD-1 Community Facilities	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $1,519,092.00	Public facility or infrastructure activities other than low-/moderate-income housing benefit: 15,625 Persons assisted
16.	CD-2 Infrastructure	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $0.00	Public facility or infrastructure activities other than low-/moderate-income housing benefit: 0 Persons assisted
17.	CD-3 Public Services	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $112,500.00	Public Service Activities other than Low/Moderate Income Housing Benefit: 175 Persons Assisted
18.	CD-4 Nutritional Services	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $265,500.00	Public Service Activities other than low-/moderate income housing benefit: 6,400 Persons Assisted

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
19.	CD-5 Public Safety	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $0.00	Public facility or infrastructure activities other than low-/moderate-income housing benefit: 0 Persons assisted Public Service Activities other than Low/Moderate Income Housing Benefit: 0 Persons Assisted
20.	CD-6 Clearance/Demolition	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $0.00	Buildings demolished: 0 Buildings
21.	CD-7 Transportation	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $0.00	Public facility or infrastructure activities other than low-/moderate-income housing benefit: 0 Persons assisted Public Service Activities other than Low/Moderate Income Housing Benefit: 0 Persons Assisted

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
22.	ED-1 Employment	2026	2030	Non-Housing Community Development	County-wide	Economic Development Priority	CDBG: $0.00	Public service activities other than low-/moderate-income housing benefit: 0 Persons assisted Jobs created/retained: 0 Jobs
23.	ED-2 Development	2026	2030	Non-Housing Community Development	County-wide	Economic Development Priority	CDBG: $0.00	Businesses assisted: 0 Businesses assisted
24.	ED-3 Redevelopment	2026	2030	Non-Housing Community Development	County-wide	Economic Development Priority	CDBG: $0.00	Public facility or infrastructure activities other than low-/moderate-income housing benefit: 0 Persons assisted Façade treatment/business-building rehabilitation: 0 Business Brownfield acres remediated: 0 Acres

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
25.	ED-4 Financial Assistance	2026	2030	Non-Housing Community Development	County-wide	Economic Development Priority	CDBG: $0.00	Businesses assisted: 0 Businesses assisted
26.	AM-1 Overall Coordination	2026	2030	General Administration	County-wide	Administration, Planning, and Management Priority	CDBG: $717,346.00	Other: 5 other
27.	AM-2 Fair Housing	2026	2030	General Administration	County-wide	Administration, Planning, and Management Priority	CDBG: $0.00	Other 0 other

Table 54 - Goals Summary

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Goal Descriptions

1.	Goal Name	HS-1 Housing Rehabilitation
	Goal Description	Conserve and rehabilitate owner- and renter-occupied affordable housing units across the County by addressing code violations, necessary repairs, energy conservation, utility improvements, and accessibility for persons with disabilities.
2.	Goal Name	HS-2 Housing Construction
	Goal Description	Increase the supply of decent, safe and sanitary accessible housing that is affordable to low- and moderate-income homebuyers and renters in the County by providing funds for acquisition, development fees, infrastructure improvements, construction, rehabilitation, and redevelopment of vacant land and buildings.
3.	Goal Name	HS-3 Homeownership
	Goal Description	Assist low- and moderate-income homebuyers in purchasing homes through down payment & closing cost assistance and housing counseling.
4.	Goal Name	HS-4 Housing Assistance
	Goal Description	Provide funds for utility payments, deposits, and rental fees for low-income households who are faced with the threat of eviction or who may be at risk of becoming homeless.
5.	Goal Name	HS-5 Fair Housing
	Goal Description	Continue to cooperate with housing agencies and organizations to ensure that Union County residents are aware of their legal rights and available fair housing resources.
6.	Goal Name	HO-1 Housing Opportunities
	Goal Description	Improve housing opportunities and living conditions for persons and families who are homeless or who are at risk of becoming homeless.
7.	Goal Name	HO-2 Support and Management Services
	Goal Description	Promote and assist supportive and management services for public and non-profit agencies and organizations which assist persons who are homeless or who are at risk of becoming homeless.

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8.	Goal Name	HO-3 Homeless Prevention
	Goal Description	Promote and assist in anti-eviction activities and work to resolve unfair housing practices which may contribute to homelessness.
9.	Goal Name	HO-4 Permanent Supportive Housing
	Goal Description	Promote and assist in the development of new permanent supportive housing opportunities for persons and families who are experiencing homelessness and who are exiting shelters and transitional housing programs.
10.	Goal Name	HO-5 Shelter Housing
	Goal Description	Support and assist in the development of shelters and supportive training and educational programs for sheltered residents.
11.	Goal Name	SN-1 Housing
	Goal Description	Increase the number of decent, safe, sound, sanitary, accessible and affordable units that are available and accessible to all sectors of the special needs populations.
12.	Goal Name	SN-2 Accessibility
	Goal Description	Promote and assist in making accessibility improvements to existing housing units, including making reasonable accommodations for the physically disabled so they can continue to remain in their homes.
13.	Goal Name	SN-3 Social Services
	Goal Description	Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.
14.	Goal Name	SN-4 Removal of Architectural Barriers
	Goal Description	Remove architectural barriers which restrict the mobility and access to public facilities and services for persons with physical disabilities.
15.	Goal Name	CD-1 Community Facilities
	Goal Description	Improve parks and trails, recreational and community facilities, and public buildings throughout the County.

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16.	Goal Name	CD-2 Infrastructure
	Goal Description	Rehabilitate, reconstruct, and/or construct new public infrastructure such as roadways, sidewalks, bridges, curbs, walkways, water and sanitary sewer lines, storm water drainage, and related improvements.
17.	Goal Name	CD-3 Public Services
	Goal Description	Improve and enhance public services and programs for youth, the elderly, persons with disabilities, and general social/welfare public service programs for low- and moderate-income County residents.
18.	Goal Name	CD-4 Nutritional Services
	Goal Description	Promote and support food and nutrition programs to address the needs of the elderly and persons with disabilities, the unemployed, underemployed, and homeless.
19.	Goal Name	CD-5 Public Safety
	Goal Description	Improve and enhance public safety and emergency response through facility improvement and new construction, purchase of new equipment, crime prevention, community policing, and other related activities.
20.	Goal Name	CD-6 Clearance/Demolition
	Goal Description	Remove and eliminate slum and blighting conditions through demolition of vacant, abandoned, and dilapidated structures.
21.	Goal Name	CD-7 Transportation
	Goal Description	Support the expansion of public transportation and improvements to pedestrian, bicycle, and vehicular transportation routes to assist low- and moderate-income residents, the elderly, persons with disabilities, and persons with other special needs in accessing medical services, employment, childcare, training, and other essential needs and services.
22.	Goal Name	ED-1 Employment
	Goal Description	Support and encourage job creation, job retention, and job training opportunities in partnership with nonprofits and educational institutions.

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23.	Goal Name	ED-2 Development
	Goal Description	Support business and commercial growth through expansion and new development including entrepreneurship and small business development in partnership with economic development organizations.
24.	Goal Name	ED-3 Redevelopment
	Goal Description	Plan and promote the development, redevelopment, and revitalization of vacant commercial and industrial sites.
25.	Goal Name	ED-4 Financial Assistance
	Goal Description	Support and encourage new economic development through local, state, and Federal tax incentives and programs such as Tax Incremental Financing (TIF), Local Economic Revitalization Tax Assistance (LERTA), Enterprise Zones/Entitlement Communities, Section 108 Loan Guarantees, Economic Development Initiative (EDI) funds, Opportunity Zones, Congressionally Directed Spending, etc.
26.	Goal Name	AM-1 Overall Coordination
	Goal Description	Provide program management and oversight for the successful administration of Federal, State, and locally funded programs, including planning services for special studies, annual action plans, five-year consolidated plans, substantial amendments, consolidated annual performance and evaluation reports (CAPER), environmental reviews and clearances, fair housing, and compliance with all Federal, State, and local laws and regulations.
27.	Goal Name	AM-2 Fair Housing
	Goal Description	Support the local Fair Housing Agencies and assist in the enforcement of Fair Housing Choice violations, undertake studies and other actions to demonstrate the County's commitment to Affirmatively Further Fair Housing (AFFH).

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Estimate the number of extremely low-income, low-income, and moderate-income families to whom the jurisdiction will provide affordable housing as defined by HOME 91.315(b)(2)

The County estimates it will provide the following affordable housing assistance throughout the next five years:

- **Homeowner housing rehabilitated:** 50 housing units
- **Renter housing rehabilitated:** 0 housing units
- **Direct Financial Assistance to Homebuyers:** 0 homebuyers assisted

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SP-50 Public Housing Accessibility and Involvement - 91.215(c)

Need to Increase the Number of Accessible Units (if Required by a Section 504 Voluntary Compliance Agreement)

Of the 205 CARE Project-Based Voucher units, 45 are dedicated to elderly and/or disabled residents. The MHA has a Section 504 Plan which is reviewed annually and updated as needed.

The Monroe Housing Authority generally houses applicants with disabilities in a reasonable time with units that are appropriate for the accessibility need of the household. Unit size and amenities are arranged when the applicant reaches the top of the waiting list. It does use additional preference points for elderly and disabled applicants when placing them on the waiting list. For disabled persons under age 62 seeking to use a Mainstream voucher to obtain private housing, preference is given in the following categories:

a. Transitioning out of institutional and other segregated settings
b. At serious risk of institutionalization
c. Currently experiencing homelessness
d. Previously experienced homelessness and currently a client in a permanent supportive housing or rapid rehousing facility
e. At risk of homelessness

According to the Housing Authority's Agency Plan, the housing authority is able to house applicants with disabilities in a reasonable time and has experienced no problems with finding units that fit the accessibility needs of the disabled. Applicants are asked if any member of the household requires a reasonable accommodation in order to access MHA programs or CARE facilities. If accommodations are required, MHA will work with the client to meet their needs. The housing authority is not fully aware of the client's specific needs until housing is available, at which point the household in need will coordinate with MHA/CARE staff to determine what reasonable accommodations can be made.

Activities to Increase Resident Involvement

Monroe Housing Authority maintains a voluntary Family Self-Sufficiency (FSS) program that is available to households receiving a subsidy through MHA's HCV, PBV, and RAD-PBV programs. MHA households in compliance with MHA, CARE, and FSS regulations are eligible for FSS participation. The FSS program seeks to help families make progress toward economic security by supporting the family's efforts to increase their earned income, build financial capability, and achieve their financial goals. The following is a list of the supportive service needs of the families expected to enroll in the MHA FSS program:

- Training in basic skills and executive function (including household management)
- Employment training, including sectoral training and contextualized and/or accelerated basic skills instruction

- Job placement assistance
- GED preparation
- Higher education guidance and support
- English as a Second Language
- Assistance with accessing and paying for child care
- Transportation assistance
- Financial coaching, including assistance with budgeting, banking, credit, debt, and savings
- Access to counseling or treatment for substance abuse and mental health
- Dental care, health care, and mental health care including substance abuse treatment and counseling
- Homeownership readiness

Upon enrollment in the Family Self-Sufficiency program, the FSS Coach will meet with the family to conduct an FSS needs assessment. This assessment will inform the development of the Individual Training and Services Plan (ISTP) and determine supportive services needed and/or barriers to overcome for the FSS family to achieve the goals outlined in the ISTPs to successfully complete the program. FSS Coaches may also utilize various financial assessments to assist participants to develop individual financial goals and determine what types of financial education and coaching are needed. Ongoing needs and financial assessments may be administered by the FSS Coach through regular participant outreach and engagement activities to inform any changes that need to be made to the ISP.

The Monroe Housing Authority's FSS Coaches will provide referrals to the following services as needed to help FSS participants achieve their goals:

- Assessment for educational and disability needs
- After-school child care (with Rising Star Daycare)
- Assistance with car repairs and purchase
- High School equivalency/GED (with Union County Public Schools)
- Child and Adult Protective Services
- Household management training
- Homeownership preparation
- Financial empowerment
- Individual Development Accounts
- Legal services
- Debt resolution and credit repair

According to the Housing Authority's Agency Plan, the housing authority is able to house applicants with disabilities in a reasonable time and has experienced no problems with finding units that fit the accessibility needs of the disabled. Applicants are asked if any member of the household requires reasonable accommodation in order to access MHA programs or CARE facilities. If accommodation is required, MHA will work with the client to meet their needs. The housing authority is not fully aware of

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the client's specific needs until housing is available, at which point the household in need will coordinate with MHA/CARE staff to determine what reasonable accommodation can be provided..

All four of the CARE communities have resident councils which meet monthly. MHA also offers periodic community activities at its CARE locations. Past activities have included free CPR courses, Back To School supply giveaways, and help with preparing family emergency plans for natural disasters such as hurricanes.

Is the public housing agency designated as troubled under 24 CFR part 902?

No

Plan to remove the 'troubled' designation

The Monroe Housing Authority is a "High Performer" and not a "troubled" Housing Authority. Not Applicable.

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SP-55 Barriers to affordable housing - 91.215(h)

Barriers to Affordable Housing

The population of Union County has exploded after decades of relative sleepiness with little to no growth. Between the 1970 and 2020 U.S. Censuses, the County's population grew from 54,717 persons to 238,267 persons. Union County's proximity to the Charlotte, NC Metropolitan Area has led to its massive growth. The County's population has grown 433% since 1960 after decades of little to no growth, for a yearly growth rate of 7.2%. The majority of this growth occurred between 1990 and 2020. The growth of Union County area is largely due to its role as a bedroom community for the Charlotte-Concord-Gastonia, NC-SC Metropolitan Statistical Area overlaid with its historic farming and forestry industries.

This demand has vastly increased the pressure on the County's housing market, and even with the housing boom there is a large disparity between the cost of owner-occupied housing and the financial resources of low- and moderate-income households. To ease these housing pressures and disparities the County will encourage and support a well-planned, diverse housing environment offering a mix of housing to all income groups and offering a safe and pleasant living environment. Neighborhoods will be strengthened through nurturing community spirit to create a sense of pride. The *Union County 2050* Comprehensive Plan outlines strategies that will help to garner public policy support and guide investment in affordable housing developments. Union County will also collaborate with its municipal partners to guide and regulate housing development, and to support the efforts of local non-profit housing providers who create and renovate affordable housing.

While the Plan addresses multiple areas, its primary areas of concern are traffic congestion, development density, rural character, agribusiness, flooding, safe drinking water, and broadband access. These all have either a direct or indirect impact on Union County's available affordable housing supply, from ensuring that affordable housing is sufficient and located in convenient areas without being overly concentrated, to making sure that in-person and remote jobs are available to residents.

Strategy to Remove or Ameliorate the Barriers to Affordable Housing

Union County takes seriously its responsibility to not only facilitate affordable housing and residential investment, but also to ensure its ordinances and policies do not interfere in residents' ability to obtain affordable housing. The County's Budget & Grants Management and Building Code Enforcement departments periodically review County Ordinances and policies to ensure that they remain in compliance with Federal and State law, and that they do not present barriers to affordable housing.

In terms of publicly funded programs, the County will continue to promote, finance, and expand their Home Repair Program. The County will promote housing and utility assistance programs offered by nonprofit entities and may choose to support those programs with CDBG or other funding. It will also work with nonprofits to provide new or renovated housing to low-income families. The Monroe Housing Authority will continue to provide low-income eligible households with Section 8 vouchers to use at the

property of their choice, and CARE will continue to maintain and operate their four Project-Based Voucher properties to provide high-quality housing for low-income County residents. Finally, the County's Planning & Development Department will continue to identify properties for rehabilitation, renovation, or demolition and new construction.

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SP-60 Homelessness Strategy - 91.215(d)

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The Piedmont Region of the NC BOSCoC (Balance of State Continuum of Care) has an intake assessment process that identifies the additional services an individual or family may need and has created a streamlined referral process. The Piedmont Region covers five counties; in four of the counties, the emergency shelters act as the designated coordinated assessment sites in the County. These facilities are natural places for persons to seek help in the region. The assessment sites include Union County Community Shelter, Stanly County Community Inn, Crisis Ministry of Davidson County and Rowan Helping Ministries. Agencies in the region are committed to conducting the Emergency Response Screening in person for each individual or family that presents for shelter at any time.

Financial Assistance

Union County Community Support and Outreach is the local administrator of the North Carolina Work First program, which helps resident children and families in temporary financial crisis achieve self-sufficiency through financial assistance, employment and supportive services. The program uses a strength-based, family-centered approach. The program goals are job readiness and employment; child well-being; economic self-sufficiency; and improved physical and mental health for families. To apply for Work First, families must provide documentation of identity, address or living arrangement, age, kinship, citizenship or legal alien status, Social Security number, income, and financial assets or resources.

Mental Health Services

Partners Health Management is a public local management entity/managed care organization (MCO) whose mission is to be a Member Care Organization. The organization offers health plans for Tailored Plan members, state-funded recipients, and NC Medicaid Direct beneficiaries in 15 North Carolina counties: Burke, Cabarrus, Catawba, Cleveland, Davidson, Davie, Forsyth, Gaston, Iredell, Lincoln, Rutherford, Stanly, Surry, Union and Yadkin. It prioritizes integrated-whole person care for our members and families, with a focus on mental health, substance use disorders, intellectual/developmental disabilities and traumatic brain injuries. Depending on client health plan, it covers services for behavioral health, I/DD, physical health and pharmacy.

Veterans Affairs

W.G. Hefner VA Medical Center in Salisbury, NC is the local veteran services provider with seventy-three (73) Permanent Supportive Housing beds for veterans. The SSVF program provides rapid rehousing and prevention services for veterans and their families. Rowan Helping Ministries in Salisbury maintains fourteen (14) beds for veterans, but Salisbury is over fifty miles from Monroe and there are no beds specifically set aside for veterans at the Union County Community Shelter. The Region 5 system utilizes

the VA's hotline for veterans in need of assistance with housing, health care and mental health services. Veterans in need of assistance can either contact the State Veteran Service Center at 7508 E. Independence Blvd, Suite 119, Charlotte NC 28227, or the Union County Veterans Services Office in the County Government Building. The US Veterans Administration has designated Volunteers of America of the Carolinas, Inc. as the SSVF administrator for North Carolina.

Prevention Services

Households are able to access prevention services through linkages from service providers in the community. Veterans access SSVF by contacting the SSVF grantees in the BOSCoC. Volunteers of America of the Carolinas, Inc. is the administrator for SSVF in the Piedmont Region.

Legal/Judicial System

The Union County Community Shelter (UCCS) has developed relationships with local law enforcement in the community. UCCS staff educates law enforcement on what services are available and how to make referrals for citizens that may show signs of being at risk.

Addressing the emergency and transitional housing needs of homeless persons

Union County does not receive Emergency Solutions Grant (ESG) funding, nor does it carry out shelter activities on its own accord. Local non-profit organizations, such as the Community Shelter of Union County and Turning Point, Inc., meet the emergency housing needs of homeless persons within the County. Neither the Community Shelter nor Turning Point currently operate transitional housing within their homeless services spectrum, and persons in need of transitional housing are directed by BOSCoC Piedmont Region staff to service providers outside of Union County.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.

Homeless needs are addressed in the community through the Union County Community Shelter and its partner organizations including Turning Point, Inc., Common Heart, and Union County Crisis Assistance Ministries. Union County also has representation in the Piedmont Region of the Balance of State Continuum of Care. The entry point for the homeless service provider system in Union County is through the Community Shelter of Union County. The long-term goal for new UCCS clients is for the client to return to independent living. This is accomplished through services including emergency shelter, food, rehousing,

economic mobility, and post-housing services. Each client is assigned a case manager who works with the client to develop an individualized plan to obtain and maintain permanent housing.

Holistic case management is key to provision of services to address the needs of an individual or household. The ability to link a client to health and human service agencies, work toward increasing their income as well as improving financial skills is invaluable. Thrive! Union has identified the need to assist the chronic homeless in becoming self-sufficient by providing much needed resources. Using services such as Turning Point's Homeless Outreach Program to go to locations where the homeless congregate to provide information on available resources has been found to be a start in moving persons out of chronic homelessness.

Union County does not have a permanent day resource center for persons experiencing homelessness or unstable housing. A day shelter or resource center would provide unhoused persons with a single facility where they can obtain healthcare, job assistance, laundry and hygiene facilities, and a place to stay warm or cool during extreme weather. While it does not intend to operate this type of facility on its own account, the County would like to investigate such a resource with its nonprofit and governmental partners.

Help low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families who are likely to become homeless after being discharged from a publicly funded institution or system of care, or who are receiving assistance from public and private agencies that address housing, health, social services, employment, education or youth needs

Union County partners with local area nonprofits to help low-income individuals and families avoid homelessness. Subject to funding availability, Union County Crisis Assistance Ministries provides rent, mortgage, and/or utility assistance to low-income individuals and families to prevent homelessness. Other nonprofits, such as the ARC of Union County and the Council on Aging, work with their specialized populations to help prevent homelessness.

Partners Health Management is the Balance of State CoC Region 5 (Piedmont) area care manager of Medicaid and state-funded services for mental health treatment, intellectual and developmental disabilities, substance use disorders, and traumatic brain injuries in Union County and fourteen other central North Carolina counties. It does not directly provide treatment but ensures that providers meet strict quality standards, protect patient rights, and deliver medically necessary services. PHM also reviews appeals, hears complaints and ensures fair medical decisions.

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SP-65 Lead based paint Hazards - 91.215(i)

Actions to address LBP hazards and increase access to housing without LBP hazards

The North Carolina Department of Health and Human Services (NC DHHS) Division of Public Health, Environmental Health Section monitors childhood lead exposure on the state level. State law does not require preemptive remediation but does require that property owners remediate lead paint and contaminated soil when there has been confirmed lead poisoning in a child less than six years old that occupies or regularly visits the property. This remediation can be through encapsulation or removal of lead-contaminated material, abandonment of the structure's use as a residence or childcare facility, or demolition of the structure with suitable containment measures. For property owners that choose to encapsulate or remove lead-based paint and lead-contaminated soil, they also must follow a lead maintenance plan.

The NC DHHS Division of Public Health, Health Hazards Control Unit administers two lead-based paint programs in North Carolina: the Lead-Based Paint Hazard Management Program for Abatement Activities (LHMP) and the Lead-Based Paint Hazard Management Program for Renovation, Repair and Painting (LHMP-RRP). The LHMP requires a person who performs an inspection, risk assessment, abatement or abatement design work in a child-occupied facility (such as day care centers and preschools) or target housing (built before 1978) to be certified and establishes the requirements for certification, including the oversight of required training. It also requires a person who conducts an abatement of a child-occupied facility or target housing to obtain a permit for the abatement. Additionally, the LHMP-RRP program mandates that contractors, property managers and others working for compensation in homes and child-occupied facilities built before 1978 be trained and use lead-safe work practices. They are also required to provide the lead pamphlet "Renovate Right; Important Lead Hazard Information for Families, Child Care Providers and Schools" to owners and occupants before starting renovation work.

Beginning January 1, 2010, North Carolina law requires dust sampling technicians, firms, and individuals performing renovation, repair and painting projects for compensation who disturb lead-based paint in homes and child-occupied facilities built before 1978, be certified and follow specific work practices to prevent lead contamination. Child-occupied facilities include but are not limited to childcare facilities and schools with children under the age of 6 years of age that were built before 1978.

Until December 31, 2026, or until funds are exhausted, the Asbestos and Lead-Based Paint Reimbursement Program (funded through the American Rescue Plan of 2021) and the Clean Classrooms for Kids Program can reimburse up to two-thirds of the cost of abatement for eligible public schools, and up to 100% of the cost for licensed child care facilities. NC DHHS also maintains lists of accredited asbestos professionals and certified lead-based paint professionals for these institutions.

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How are the actions listed above related to the extent of lead poisoning and hazards?

Lead poisoning affects many children age 6 or younger, causing lifelong learning and behavior problems by interfering in brain development. Though lead is a naturally occurring element, the largest source of lead contamination in the home is caused by chipping, peeling, flaking or deteriorating lead-based paint (LBP). Lead can also enter the home through some toys, jewelry, and other consumer products, lead potable water plumbing, contaminated soil from leaded gasoline and chemical processing, and industrial use of lead metal or chemicals. Lead poisoning has decreased over the years, but there is no safe level of lead. The only way to know if a child has been exposed is a blood test.

Lead was banned from residential paint in 1978 but approximately half of the U.S. housing stock still contains some lead-based paint. According to the 2017-2021 CHAS data, approximately 19.8% of the housing stock in Union County was built prior to 1980 which raises the risk of lead-based paint presence, and 3.3% of housing in Union County was constructed before 1980 and is inhabited by children age 6 or younger. Low-income tenants and owners are at proportionally higher risk of lead-based paint presence in their dwellings, as homeowners may be financially unable to conduct lead abatement and landlords are less willing to invest in renovating low-rent apartments.

How are the actions listed above integrated into housing policies and procedures?

Union County provides educational materials about lead-based paint and other common hazards found in structures to all housing contractors and citizens receiving housing rehabilitation assistance. When the County provides CDBG funding for projects and activities, it uses the following policies and procedures to ensure lead compliance:

- Requiring Phase I environmental reports to include an analysis of lead-based paint if a project involves acquisition of pre-1978 multi-family projects.
- Requiring rehabilitation projects that involve identified lead-based paint issues to include mitigation activities in the work specification write-up.
- Educating the community on the dangers of lead poisoning through distribution of brochures.

Union County Environmental Health's Childhood Lead Prevention Program protects and improves the health of children from the harmful effects of lead through the implementation of the North Carolina Rules Governing Lead Poisoning Prevention in Children (15A NCAC 18A .3100). Union County Environmental Health coordinates and assists in the environmental investigation of children who have experienced lead poisoning. It also offers extensive resources on how to recognize lead poisoning, identifies common sources of lead in homes, and lists of both lead-certified contractors and physicians who can test children and pregnant women for lead exposure. The program has received recognition for its creative, community-driven approach to raising awareness about childhood lead poisoning prevention. This includes partnerships with local medical providers, targeted outreach to residents in Union County's historic home districts, and a Lead Prevention Story Time at the Union County Library.

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SP-70 Anti-Poverty Strategy - 91.215(j)

Jurisdiction Goals, Programs and Policies for reducing the number of Poverty-Level Families

According to the 2019-2023 American Community Survey Data, approximately 5.7% of Union County families were living in poverty, much lower than the 9.4% of North Carolina families living in poverty. In Union County, female-headed households with children under 5 years are particularly affected with 36.2% living in poverty.

The County's median household income was $113,755 as of the 2019-2023 ACS, much higher than the North Carolina median household income of $86,947. Additionally, 57% of Union County residents had a household income of over $100,000. While this is an indicator of a comparatively wealthy county, it also reflects the fact that the population's income is stratified, and the lowest income persons do not necessarily earn a living wage. A high proportion of jobs available in the County are in the retail sector or in the arts, entertainment, accommodation and food service sectors, which tend to offer low-paying jobs. Positions in healthcare, management & administration usually require a bachelor's degree or higher which only 39% of the population 25 years and older possess, and higher-paying jobs in the manufacturing and construction fields that do not require college degrees are in relatively short supply. Additionally, the majority of high-paying jobs available to Union County residents also require a private automobile to access them, whether they are based in Union County or elsewhere in the greater Charlotte area. There is a need to increase employment, workforce development, self-sufficiency, educational training, and transportation options for residents of the County.

Union County is committed to reducing the number of households that are at or below the poverty level by supporting programs to motivate and assist them to move toward self-sufficiency. The County will continue to support the efforts of local agencies who are working with consumers who may be at the poverty level or below the poverty level. Jurisdictions work with various service providers and other units of local government to provide low-income citizens with supportive services. Programs and services provided include:

- Food and Nutrition Services via SNAP
- Family and Children's Medicaid
- Child Care Subsidy Assistance
- Work First Family Assistance (North Carolina's Temporary Assistance for Needy Families (TANF) program) assists families that are in a temporary financial crisis. The Work First program promotes a strengths-based, family-centered practice approach and is based on the premise that parents have a responsibility to support themselves and their children. Their services include employment services for parents and support for grandparents and guardians to forestall foster care.
- The Union County Crisis Assessment Unit helps individuals and families who are going through a crisis and refers them to resources. This can include assistance with rent and deposits for families with minor children, referrals for food assistance, and referrals for adult daycare and in-home aide services in coordination with government agencies and nonprofit organizations.

The main anti-poverty strategy for the County is to attract a range of businesses and support workforce development and job training for low- and moderate-income County residents. The County's strategy will also provide supportive services for targeted-income residents. Most of the priorities identified by the County will reduce poverty, but the following priorities specifically address anti-poverty actions:

- **HS-3 Homeownership** - Assist low- and moderate-income homebuyers in purchasing homes through down payment and closing cost assistance and associated housing counseling.
- **HS-4 Housing Assistance** - Provide funds for utility payments, deposits, and rental fees for low-income households who are faced with the threat of eviction or who may be at risk of becoming homeless.
- **HO-3 Homelessness Prevention** - Promote and assist in anti-eviction activities and work to resolve unfair housing practices which may contribute to homelessness.
- **CD-6 Clearance/Demolition** - Remove and eliminate slum and blighting conditions through demolition of vacant, abandoned, and dilapidated structures.
- **ED-1 Employment** - Support and encourage job creation, job retention, and job training opportunities in partnership with nonprofits and educational institutions.
- **ED-2 Development** - Support business and commercial growth through expansion and development including entrepreneurship and small business development in partnership with economic development organizations.
- **ED-3 Redevelopment** - Plan and promote the development, redevelopment, and revitalization of vacant commercial and industrial sites.
- **ED-4 Financial Assistance** - Support and encourage new economic development through local, state, and Federal tax incentives and programs such as Tax Incremental Financing (TIF), Local Economic Revitalization Tax Assistance (LERTA), Enterprise Zones/Entitlement Communities, Section 108 Loan Guarantees, Economic Development Initiative (EDI) funds, Opportunity Zones, Congressionally Directed Spending, etc.

How are the Jurisdiction's poverty-reduction goals, programs, and policies coordinated with this affordable housing plan?

The County will continue to investigate barriers to affordable housing using data from the US Census, HUD, the Bureau of Labor Statistics, and other governmental and non-governmental information. Using this data as well as continued public input and information from stakeholder groups, the County will select the most appropriate activities to address and reduce the number of persons living in poverty.

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SP-80 Monitoring - 91.230

Describe the standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan and will use to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

Monitoring is the responsibility of Union County. At times Union County may include monitoring as a responsibility of a service provider contracted to provide CDBG project administration. However, Union County is aware it is the County's responsibility to ensure monitoring meets or exceeds HUD requirements and grant regulations. The County uses a monitoring checklist to review programs and activities of sub-recipients through simple project tracking and management reporting systems. This process includes monthly progress reports, financial reports and meeting reports, and review of project expenditures on a monthly basis to ensure they are in line with the project budget. This checklist was composed in accordance with 2 CFR, Part 200 "UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS". The staff also uses the HUD Community Planning and Development Monitoring Handbook (HUD 6509.2) for guidance.

Monitoring of subrecipient projects has five major components:

1) Grant Applications: Request for funding applications is made on a standard form and are carefully reviewed and evaluated. Points are given for each criterion covering community need, program effectiveness, financial record, and capacity. Recommendations for funding are based on evaluation of the above criteria.

2) Contractual Agreements: Union County enters into a two-part contractual grant agreement with each subrecipient. Part I of the agreement describes the tasks to be performed (Scope of Services) with the grant funds, the results to be achieved, and other conditions specific to the project. Part II lists all federal standards that the agency must comply with. Each funded activity is assigned to the Compliance Project Manager. The Project Manager conducts pre-monitoring, desk monitoring, and on-site monitoring visits at least twice per program year.

3) Monitoring Records: For each subrecipient, the staff will maintain monitoring records that include the following:

- Basic recipient information
- Monitoring Plan- A risk assessment is carried out to determine the appropriate frequency of on-site visits, and the areas to be reviewed, including some or all of financial management, client eligibility, program effectiveness, property, procurement, program income, fair housing, and equal opportunity information.
- Subrecipient training and/or technical assistance provided.
- Review of the agency's CPA audit (when applicable)

- Quarterly financial reports and monthly draw requests from the subrecipient
- Quarterly or monthly progress reports, whichever is required per the subrecipient agreement.
- On-site monitoring reports
- Correspondence and notes of significant telephone conversations

4) On-Site Visits: Staff will perform on-site monitoring reviews at least quarterly, depending on the assessment of risk for non-compliance. Program operations are observed, subrecipient staff is interviewed, client eligibility confirmed, and financial and programmatic reports verified from original documentation.

5) Long-Term Compliance: Activities involving real property acquisitions or improvement require long-term compliance with the original purpose of the federal assistance. Union County will annually update its inventory of all CDBG Real Property and confirm that such property is still being used for the intended purpose.

Public Review: Per the Union County 2021 Citizen Participation Plan, the County shall provide opportunities for residents, public agencies, and other interested parties with reasonable and timely access to information and records relating to the jurisdiction's Consolidated Plan, as well as the proposed, actual, and past use of funds covered by this Citizen Participation Plan. Before the adoption of the Consolidated Plan, the County will make available to residents, public agencies, and other interested parties information that includes the amount of assistance the County expects to receive, the range of activities that may be undertaken, the estimated amount of funding that will benefit persons of low- and moderate-income, and the County's plans to minimize displacement of persons and to assist any persons displaced. The County shall make reasonable effort to assure that CDBG program information is available to all residents, especially those of low and moderate incomes and those residing in blighted or limited English proficiency neighborhoods and/or CDBG project areas.

Standard documents will be available for public review at the Union County Government Center at 500 N. Main St., Monroe, NC 28112. Copies can also be found on the Union County website. These documents will also be available in a form accessible to persons with disabilities upon request (this may include but is not necessarily limited to providing documents in Braille, electronic copies, or large print copies for the visually impaired). Information from CDBG project files shall be made available for examination and duplication, on request, during regular business hours. Standard CDBG program information and materials will also be made available and distributed to the public at the regularly scheduled public hearings as outlined in this Plan. The County will also provide a reasonable number of free copies of the Consolidated Plan, Annual Action Plans, Substantial Amendments, and the Citizen Participation Plan to residents and groups that request them.

Materials to be made available shall include, but are not necessarily limited to, the Citizen Participation Plan, records of public hearings, mailings and promotional materials, prior CDBG Annual Action Plan, grant agreements, the environmental review record, procurement records, project design and construction specifications, labor standards materials, performance evaluation reports, proposed and approved CDBG

Annual Action Plan for the current year, written comments or complaints received concerning the community development program along with the written responses from Union County, and copies of the Federal and State rules, regulations, policies, requirements, and procedures governing the CDBG program.

The accomplishments of projects/activities funded during a given Federal Fiscal Year will be reported in that year's Consolidated Annual Performance and Evaluation Report (CAPER). However, in no case shall Union County disclose any information concerning the financial status of any program participant(s) which may be required to document program eligibility or benefit. Furthermore, the County shall not disclose any information which may, in the opinion of the County Manager, be deemed of a confidential nature.

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Annual Action Plan

AP-15 Expected Resources - 91.220(c)(1,2)

Introduction

Union County anticipates that it will receive $843,937 in CDBG grant funding for the FY 2026 program year between July 1, 2026, and June 30, 2027. However, rapidly evolving Federal funding priorities make it difficult to forecast if Union County will experience an increase or decrease in year-over-year CDBG funding. To ensure it does not exceed potential Federal funding, the County will anticipate a 5% cut in funds each year during the FY 2026-2030 Five-Year Consolidated Plan period. The following represents Union County's anticipated resources for the upcoming five Federal fiscal years:

- FY 2026: $843,937.00 CDBG Funds
- FY 2027: $801,740.00 CDBG Funds
- FY 2028: $759,543.00 CDBG Funds
- FY 2029: $717,346.00 CDBG Funds
- FY 2030: $675,150.00 CDBG Funds

Total: $3,797,716.00 CDBG Funds

The accomplishments of projects/activities funded during FY 2026 will be reported in the FY 2026 Consolidated Annual Performance and Evaluation Report (CAPER).

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Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of Con Plan: $	Narrative Description
			Annual Allocation: $	Program Income: $	Prior Year Resources: $	Total: $		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	$843,937	$0	$0	$843,937	$2,953,779	Four years of funding at 5% reduced level each year.

Table 55 - Anticipated Resources

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

While there are no federal match requirements for CDBG funds, Union County highly recommends that organizations provide matching funds if possible. Match fund sources include contributions derived from other eligible federal and nonfederal sources and the value of third-party in-kind contributions, (i.e., volunteers, personnel, office space, materials, equipment, and supplies). Matching funds are not required, but applications will receive favorable scoring based on leveraging funds.

The following are some of the available funding resources available to leverage and supplement CDBG funding which can address needs identified in the Consolidated Plan:

- The Community Shelter of Union County receives Emergency Solutions Grant (ESG) funding through the NC-503 North Carolina Balance of State Continuum of Care (BOSCoC). The CoC may also distribute funding through the HUD Housing Opportunities for Persons with AIDS (HOPWA) program, though the County does not anticipate any HOPWA-funded projects during the upcoming Five Year period.
- Turning Point, Inc. receives a grant from within the Administration for Children and Families, a division of the U.S. Department of Health and Human Services. It also receives state, local, and nonprofit funding, including regular financial support from the Union County government.

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- The Monroe Housing Authority administers Section 8 Housing Choice Vouchers and is allocated Project-Based Vouchers for use at its nonprofit affiliate Community Advancement & Redevelopment Enterprise, which operates the former MHA public housing units for low- and moderate-income households.
- Union County receives various sources of funding for land banking, stream restoration, and conservation from programs such as the NC Land and Water Fund, the North Carolina Parks and Recreation Trust Fund, the NC Agricultural Development and Farmland Preservation Trust Fund, the USDA Agricultural Conservation Easement Program, the Land and Water Conservation Fund, and the Regional Conservation Partnership Program.
- The County will continue to support and encourage new economic development through local, state, and Federal tax incentives and programs such as Tax Incremental Financing (TIF), Local Economic Revitalization Tax Assistance (LERTA), Enterprise Zones/Entitlement Communities, Section 108 Loan Guarantees, Economic Development Initiative (EDI) funds, Opportunity Zones, Congressionally Directed Spending, etc.
- Private developers in the County often contribute cash or in-kind improvements to housing and industrial projects that are partially funded by the Union County CDBG entitlement.
- As appropriate, the County and its subrecipients may access other forms of matching funds including private donations, foundational grants, and specialized government programs.

If appropriate, describe publicly owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

Not Applicable.

Discussion

With limited resources available to address the needs identified in the Five-Year Consolidated Plan, the County works cooperatively with private, public, and non-profit partners to address the identified needs.

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Annual Goals and Objectives

AP-20 Annual Goals and Objectives

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1.	HS-1 Housing Rehabilitation	2026	2030	Affordable Housing	County-wide	Housing Priority	CDBG: $337,575.00	Homeowner housing rehabilitated: 10 Homeowner Housing Units
2.	SN-3 Social Services	2026	2030	Non-Homeless Special Needs	County-wide	Other Special Needs Priority	CDBG: $42,590.00	Public service activities other than low-/moderate-income housing benefit: 40 Persons Assisted
3.	CD-1 Community Facilities	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $337,576.00	Public facility or infrastructure activities other than low-/moderate-income housing benefit: 3,125 Persons Assisted
4.	CD-3 Public Services	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $25,000.00	Public service activities other than low-/moderate-income housing benefit: 35 Persons Assisted
5.	CD-4 Nutritional Services	2026	2030	Non-Housing Community Development	County-wide	Community Development Priority	CDBG: $59,000.00	Public service activities other than low-/moderate-income housing benefit: 1,280 Persons Assisted
6.	AM-1 Overall Coordination	2026	2030	Administration, Planning, and Management	County-wide	Administration, Planning, and Management Priority	CDBG: $42,196.00	Other: 1 other

Table 56 - Goals Summary

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Goal Descriptions

1.	Goal Name	HS-1 Housing Rehabilitation
	Goal Description	Conserve and rehabilitate owner- and renter-occupied affordable housing units across the County by addressing code violations, necessary repairs, energy conservation, utility improvements, and accessibility for persons with disabilities.
2.	Goal Name	SN-3 Social Services
	Goal Description	Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.
3.	Goal Name	CD-1 Community Facilities
	Goal Description	Improve parks and trails, recreational and community facilities, and public buildings throughout the County.
4.	Goal Name	CD-3 Public Services
	Goal Description	Improve and enhance public services and programs for youth, the elderly, persons with disabilities, and general social/welfare public service programs for low- and moderate-income County residents.
5.	Goal Name	CD-4 Nutritional Services
	Goal Description	Promote and support food and nutrition programs to address the needs of the elderly and persons with disabilities, the unemployed, underemployed, and homeless.
6.	Goal Name	AM-1 Overall Coordination
	Goal Description	Provide program management and oversight for the successful administration of Federal, State, and locally funded programs, including planning services for special studies, annual action plans, five-year consolidated plans, substantial amendments, consolidated annual performance and evaluation reports (CAPER), environmental reviews and clearances, fair housing, and compliance with all Federal, State, and local laws and regulations.

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Projects

AP-35 Projects - 91.220(d)

Introduction

During the FY 2026 Program Year, Union County will receive a total of $843,937.00 in CDBG funds.

Union County proposes undertaking the following activities with the FY 2026 CDBG funds:

#	CDBG Project Name	
1.	Administration & Planning	$42,196.00
2.	CSUC - Community Meals & Pantry Program	$34,000.00
3.	Council on Aging - In-Home Assistance for Seniors	$42,590.00
4.	Common Heart - Economic Empowerment Program	$25,000.00
5.	Common Heart - Cupboard Ally Delivery Program	$25,000.00
6.	Infrastructure and Improvement - Park Projects	$337,576.00
7.	Habitat for Humanity - Individual Home Repair	$337,575.00
	Total CDBG Expenditure	**$843,937.00**

Table 57 - Project Information

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

Union County has allocated its CDBG funds for FY 2026 based on which activities will benefit low- and moderate-income persons. The allocations and priorities were established by an online survey, stakeholder meetings, follow-up surveys from service providers, and public meetings. Obstacles to addressing underserved needs include finding more federal funding resources to accomplish activities and having local resources to pair with them to make successful projects.

At least 70% of the County's CDBG funds are budgeted to activities that principally benefit low- and moderate-income persons. The following guidelines for allocating HUD funding will be used for the FY 2026 Annual Action Plan:

- Public services activities either serve clientele who are low- and moderate-income or in certain cases, limited clientele who are presumed to be low- and moderate-income such as the elderly or disabled.
- Public facilities activities are either located in a low- and moderate-income census tract/block group or have a low- and moderate-income service area benefit or clientele over 51% low- and moderate-income.

- Acquisitions and demolition activities are either located in a low- and moderate-income census area or are activities which are eligible by preventing or eliminating slums and blight on a spot basis or area basis.
- Housing activities have income eligibility criteria and are considered direct benefit as the beneficiary must be income-eligible. Applicants can be from throughout the County.
- Economic development projects will be located in a low- and moderate-income block group or a block group having greater than 20% poverty, be part of a redevelopment plan, or create jobs where at least 51% are available to low- and moderate-income residents.

The proposed activities funded through the FY 2026 CDBG Program Year are generally located in areas with the highest percentages of low- and moderate-income persons and those block groups with a percentage of minority persons above the average for Union County.

According to the 2019-2023 ACS data, Union County had a minority population of 32.0% of its total population (persons who are non-White and/or Hispanic or Latino). HUD defines a Minority Neighborhood as, “A neighborhood in which the percentage of persons of a particular racial or ethnic minority is at least 20 points higher than that minority's percentage in the housing market as a whole; the neighborhood's total percentage of minority persons is at least 20 points higher than the total percentage of minorities for the housing market area as a whole; or in the case of a metropolitan area, the neighborhood's total percentage of minority persons exceeds 50 percent of its population.”

According to the 50% definition, there are twenty (20) Block Groups in the County that are considered a “Minority Neighborhood:”

- Census Tract 203.05, Block Group 1: 50.19% minority
- Census Tract 203.21, Block Group 1: 78.76% minority
- Census Tract 204.01, Block Group 1: 61.60% minority
- Census Tract 204.01, Block Group 2: 52.35% minority
- Census Tract 204.06, Block Group 1: 90.10% minority
- Census Tract 204.06, Block Group 2: 94.04% minority
- Census Tract 204.06, Block Group 4: 90.63% minority
- Census Tract 205.01, Block Group 1: 91.00% minority
- Census Tract 205.01, Block Group 2: 53.69% minority
- Census Tract 205.01, Block Group 3: 56.22% minority
- Census Tract 205.02, Block Group 1: 69.02% minority
- Census Tract 206.01, Block Group 1: 97.44% minority
- Census Tract 206.01, Block Group 2: 52.42% minority
- Census Tract 206.01, Block Group 4: 86.19% minority
- Census Tract 206.02, Block Group 1: 80.87% minority
- Census Tract 206.02, Block Group 3: 63.20% minority
- Census Tract 207.01, Block Group 3: 71.12% minority

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- Census Tract 207.02, Block Group 1: 56.64% minority
- Census Tract 208, Block Group 4: 68.97% minority

The County uses the HUD definition of a low-mod area as any area with a population of low- and moderate-income residents that is equal to or greater than 51% of the entire population of the area. According to this definition, 32 of the 132 Block Groups within the County are considered low-mod areas:

- Census Tract 202.05, Block Group 2: 54.7% low-mod
- Census Tract 203.07, Block Group 1: 57.5% low-mod
- Census Tract 203.08, Block Group 4: 52.7% low-mod
- Census Tract 203.12, Block Group 1: 52.6% low-mod
- Census Tract 203.21, Block Group 1: 57.3% low-mod
- Census Tract 204.01, Block Group 2: 53.6% low-mod
- Census Tract 204.03, Block Group 1: 65.2% low-mod
- Census Tract 204.03, Block Group 3: 56.4% low-mod
- Census Tract 204.05, Block Group 1: 71.3% low-mod
- Census Tract 204.06, Block Group 1: 52.8% low-mod
- Census Tract 204.06, Block Group 2: 92.4% low-mod
- Census Tract 204.06, Block Group 3: 57.4% low-mod
- Census Tract 204.06, Block Group 4: 98.1% low-mod
- Census Tract 205.01, Block Group 1: 72.3% low-mod
- Census Tract 205.01, Block Group 2: 65.8% low-mod
- Census Tract 205.02, Block Group 1: 86.0% low-mod
- Census Tract 206.01, Block Group 1: 80.1% low-mod
- Census Tract 206.01, Block Group 4: 75.7% low-mod
- Census Tract 206.02, Block Group 1: 75.1% low-mod
- Census Tract 206.02, Block Group 3: 51.2% low-mod
- Census Tract 207.01, Block Group 1: 72.2% low-mod
- Census Tract 207.01, Block Group 2: 100% low-mod
- Census Tract 207.01, Block Group 3: 61.0% low-mod
- Census Tract 207.02, Block Group 1: 51.5% low-mod
- Census Tract 207.02, Block Group 2: 60.8% low-mod
- Census Tract 208, Block Group 2: 73.3% low-mod
- Census Tract 208, Block Group 3: 65.4% low-mod
- Census Tract 208, Block Group 4: 72.8% low-mod
- Census Tract 208, Block Group 5: 59.4% low-mod
- Census Tract 209.01, Block Group 1: 59.5% low-mod
- Census Tract 209.01, Block Group 2: 70.2% low-mod
- Census Tract 210.15, Block Group 1: 54.5% low-mod

Union County has an overall low-mod percentage of 35.09%.

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AP-38 Project Summary

Project Summary Information

1.	**Project Name**	**Administration & Planning**
	Target Area	County-wide
	Goals Supported	AM-1 Overall Coordination
	Needs Addressed	Administration, Planning, and Management Priority (AM)
	Funding	CDBG: $42,196.00
	Description	CDBG funds will be used to pay for general administrative costs of overseeing and managing the County's CDBG program, including office supplies, correspondence, training, salaries and benefits, employee expenses, and advertising and public outreach programs.
	Target Date	6/30/2027
	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that one (1) organization will be assisted by this program/activity.
	Location Description	Union County Budget & Grants Management Department, 500 N. Main St., Monroe, NC 28112
	Planned Activities	The HUD Matrix Code is 21A General Program Administration.
2.	**Project Name**	**CSUC - Community Meals & Pantry Program**
	Target Area	County-wide
	Goals Supported	CD-4 Nutritional Services
	Needs Addressed	Community Development Priority (CD)
	Funding	CDBG: $34,000.00
	Description	The Community Shelter of Union County (CSUC) Community Meals and Pantry Program provides consistent, nutritious food to low- and moderate-income residents experiencing food insecurity, primarily individuals experiencing homelessness, low-income households, and seniors living on fixed incomes. Primary services include three prepared meals served daily through the Community Shelter soup kitchen and twice-monthly drive-through pantry distributions that provide fresh and shelf-stable groceries to households in need. These services help address immediate hunger while supporting overall

		health, stability, and dignity for residents facing financial hardship across Union County.
	Target Date	6/30/2027
	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that 480 low- and moderate-income persons will be assisted by this program/activity.
	Location Description	Community Shelter of Union County, 160 Meadow Street, Monroe, NC 28110
	Planned Activities	The National Objective is Low/Mod Limited Clientele (LMC) benefit, 570.208(a)(2). The HUD Matrix Code is 05W Food Banks, 570.201(e).
3.	**Project Name**	**Council on Aging - In-Home Assistance for Seniors**
	Target Area	County-wide
	Goals Supported	SN-3 Social Services
	Needs Addressed	Other Special Needs Priority (SN)
	Funding	CDBG: $42,590.00
	Description	The Council on Aging in Union County's In-Home Assistance for Seniors program provides essential in-home services to economically disadvantaged older adults at no cost to clients. To qualify, clients must require assistance with at least one Activity of Daily Living (ADL) such as bathing, dressing, or grooming, and/or one Instrumental Activity of Daily Living (IADL) such as cleaning, cooking, or laundry in order to safely remain at home. The Council's team of In-Home Aides delivers direct assistance with personal care, household chores, errands, and respite for family caregivers. In addition, we conduct home safety evaluations and coordinate volunteer home modifications such as bathroom grab bars, stair handrails, and wheelchair ramps. We also provide access to durable medical equipment and incontinence supplies at no cost. CDBG funding will support 1.2 FTE (one full-time and one part-time) In-Home Aide positions, including salary, fringe, and mileage. The requested funding will specifically support services for approximately 30-40 low-to-moderate income older adults, providing personal care and household assistance one to three times per week. Our agency is licensed for home care and remains fully compliant with all regulations

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		set by the NC Department of Health and Human Services and the NC Division of Aging and Adult Services.
	Target Date	6/30/2027
	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that 40 low- and moderate-income persons will be assisted by this program/activity.
	Location Description	Council on Aging, 1401 Skyway Drive, Monroe, NC 28110
	Planned Activities	The National Objective is Low/Mod Limited Clientele (LMC) benefit, 570.208(a)(2). The HUD Matrix Code is 05A Senior Services, 570.201(e).
4.	**Project Name**	**Common Heart - Economic Empowerment Program**
	Target Area	County-wide
	Goals Supported	CD-3 Public Services
	Needs Addressed	Community Development Priority (CD)
	Funding	CDBG: $25,000.00
	Description	Common Heart's Economic Empowerment Program helps participants work toward greater financial stability and upward mobility, primarily food-insecure residents recruited through Common Heart's network of 14 pantry locations. The program begins with a 50-hour "Getting Ahead in a Just Gettin' By World" workshop to develop practical skills such as goal setting, planning, and financial management. To reduce barriers to participation, Common Heart provides dinner, childcare, and participation incentives during each session. Following graduation, participants enter an 18-month post-program support phase that includes success coaching, monthly resource meetings, and skill-building workshops which focus on strengthening financial capability, employment readiness, supportive relationships, and other key resources for economic stability. Through this comprehensive model of education, coaching, and ongoing support, Common Heart equips participants with the knowledge, relationships, and tools needed to pursue long-term economic stability and increased mobility.
	Target Date	6/30/2027
	Estimate the number and type of families	It is estimated that 35 low- and moderate-income persons will be assisted by this program/activity.

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	that will benefit from the proposed activities	
	Location Description	Common Heart, 116 Business Park Drive, Indian Trail, NC 28079
	Planned Activities	The National Objective is Low/Mod Limited Clientele (LMC) benefit, 570.208(a)(2). The HUD Matrix Code is 05H Employment Training, 570.201(e).
5.	**Project Name**	**Common Heart – Cupboard Ally Delivery Program**
	Target Area	County-wide
	Goals Supported	CD-4 Nutritional Services
	Needs Addressed	Community Development Priority (CD)
	Funding	CDBG: $25,000.00
	Description	Common Heart's Cupboard Ally Delivery Program provides monthly grocery delivery and relationship-based support to individuals and families in Union County living at or below 200% of the federal poverty level. The program primarily serves households with barriers such as limited transportation, health concerns or disabilities, work schedules that conflict with pantry hours, and individuals with medically necessary dietary restrictions. In addition to food delivery, the program includes connection to community resources, helping participants access services that support overall stability and well-being.
	Target Date	6/30/2027
	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that 800 low- and moderate-income persons will be assisted by this program/activity.
	Location Description	Common Heart, 116 Business Park Drive, Indian Trail, NC 28079
	Planned Activities	The National Objective is Low/Mod Limited Clientele (LMC) benefit, 570.208(a)(2). The HUD Matrix Code is 05W Food Banks, 570.201(e).
6.	**Project Name**	**Infrastructure and Improvement - Park Projects**
	Target Area	County-wide
	Goals Supported	CD-1 Community Facilities
	Needs Addressed	Community Development Priority (CD)
	Funding	CDBG: $337,576.00

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	Description	Union County will undertake park improvement projects to enhance access to safe, inclusive, and quality outdoor spaces for low- to moderate-income (LMI) residents. Planned activities may include park design, site improvements, lighting, accessibility enhancements, and other infrastructure upgrades necessary to create safe, functional, accessible and welcoming environments. These projects are anticipated to take place at Marshville Municipal Park, Marshville, NC, and at Jesse Helms Park, Wingate, NC.
	Target Date	6/30/2027
	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that 3,125 persons will be assisted by this program/activity.
	Location Description	Marshville Municipal Park, 800 Park Drive, Marshville, NC 28103; Census Tract 208, Block Group 3. Jesse Helms Park, 1505 Summerlin Dairy Road, Wingate, NC 28174; Census Tract 207.02, Block Group 1.
	Planned Activities	The National Objective is Low/Mod Area (LMA) benefit, 570.208(a)(1). The HUD Matrix Code is 03F Parks, Recreational Facilities, 570.201(c).
7.	**Project Name**	**Habitat for Humanity - Individual Home Repair**
	Target Area	County-wide
	Goals Supported	HS-1 Housing Rehabilitation
	Needs Addressed	Housing Priority (HS)
	Funding	CDBG: $337,575.00
	Description	Union County, in partnership with Habitat for Humanity of Union County, will provide housing rehabilitation services to low- to moderate-income homeowners to address critical health and safety repairs such as roofing, HVAC systems, electrical and plumbing repairs, accessibility modifications, and septic or well system repairs, helping residents remain safely in their homes while preserving the existing affordable housing stock. Habitat for Humanity will serve as the subrecipient responsible for program implementation, including applicant intake, income qualification, construction management, and contractor oversight. All work will comply with CDBG and other HUD requirements, including environmental review and applicable construction standards.
	Target Date	6/30/2027

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	Estimate the number and type of families that will benefit from the proposed activities	It is estimated that 10 low- and moderate-income households will be assisted by this program/activity.
	Location Description	County-wide. Managed at Union/Anson County Habitat for Humanity, 3702 Old Charlotte Highway, Monroe, NC 28110.
	Planned Activities	The National Objective is Low/Mod Housing (LMH) benefit, 570.208(a)(3). The HUD Matrix Code is 14A Rehabilitation: Single-Unit Residential, 570.202(a)(1).

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs:

Union County will allocate its CDBG funds for FY 2026 based on which activities will benefit low- and moderate-income persons. The allocations and priorities were established by an online survey, stakeholder meetings, follow-up surveys from service providers, and public meetings. Obstacles to addressing underserved needs include finding more federal funding resources to accomplish activities and having local resources to pair with them to make successful projects.

At least 70% of the County's CDBG funds are budgeted to activities that principally benefit low- and moderate-income persons. The following guidelines for allocating HUD funding will be used for the FY 2026 Annual Action Plan:

- Public services are activities social service providers perform whose clientele are low- and moderate-income or in certain cases, limited clientele who are presumed to be low- and moderate-income such as the elderly or disabled.
- Public facilities are activities either located in a low- and moderate-income census tract/block group or have a low- and moderate-income service area benefit or clientele over 51% low- and moderate-income.
- Acquisitions and demolition activities are either located in a low- and moderate-income census area or activities which are eligible by preventing or eliminating slums and blight on a spot basis or area basis.
- Housing activities have income eligibility criteria and are considered direct benefit as the beneficiary must be income eligible. Applicants can be from throughout the County.
- Economic development projects will be located in a low- and moderate-income Block Group or a Block Group having greater than 20% poverty, be part of a redevelopment plan, or create jobs where at least 51% are available to low- and moderate-income residents.

The proposed activities funded through the FY 2026 CDBG Program Year are generally located in areas with the highest percentages of low- and moderate-income persons and those block groups with a percentage of minority persons above the average for Union County.

According to the 2019-2023 ACS data, Union County had a minority population of 32.0% of its total population (persons who are non-White and/or Hispanic or Latino). HUD defines a Minority Neighborhood as, "A neighborhood in which the percentage of persons of a particular racial or ethnic minority is at least 20 points higher than that minority's percentage in the housing market as a whole; the neighborhood's total percentage of minority persons is at least 20 points higher than the total percentage of minorities for the housing market area as a whole; or in the case of a metropolitan area, the neighborhood's total percentage of minority persons exceeds 50 percent of its population."

According to the 50% definition, there are twenty (20) Block Groups in the County that are considered a "Minority Neighborhood:"

- Census Tract 203.05, Block Group 1: 50.19% minority
- Census Tract 203.21, Block Group 1: 78.76% minority
- Census Tract 204.01, Block Group 1: 61.60% minority
- Census Tract 204.01, Block Group 2: 52.35% minority
- Census Tract 204.06, Block Group 1: 90.10% minority
- Census Tract 204.06, Block Group 2: 94.04% minority
- Census Tract 204.06, Block Group 4: 90.63% minority
- Census Tract 205.01, Block Group 1: 91.00% minority
- Census Tract 205.01, Block Group 2: 53.69% minority
- Census Tract 205.01, Block Group 3: 56.22% minority
- Census Tract 205.02, Block Group 1: 69.02% minority
- Census Tract 206.01, Block Group 1: 97.44% minority
- Census Tract 206.01, Block Group 2: 52.42% minority
- Census Tract 206.01, Block Group 4: 86.19% minority
- Census Tract 206.02, Block Group 1: 80.87% minority
- Census Tract 206.02, Block Group 3: 63.20% minority
- Census Tract 207.01, Block Group 3: 71.12% minority
- Census Tract 207.02, Block Group 1: 56.64% minority
- Census Tract 208, Block Group 4: 68.97% minority

The County uses the HUD definition of a low-mod area as any area with a population of low- and moderate-income residents that is equal to or greater than 51% of the entire population of the area. According to this definition, 32 of the 132 Block Groups within the County are considered low-mod areas:

- Census Tract 202.05, Block Group 2: 54.7% low-mod
- Census Tract 203.07, Block Group 1: 57.5% low-mod

- Census Tract 203.08, Block Group 4: 52.7% low-mod
- Census Tract 203.12, Block Group 1: 52.6% low-mod
- Census Tract 203.21, Block Group 1: 57.3% low-mod
- Census Tract 204.01, Block Group 2: 53.6% low-mod
- Census Tract 204.03, Block Group 1: 65.2% low-mod
- Census Tract 204.03, Block Group 3: 56.4% low-mod
- Census Tract 204.05, Block Group 1: 71.3% low-mod
- Census Tract 204.06, Block Group 1: 52.8% low-mod
- Census Tract 204.06, Block Group 2: 92.4% low-mod
- Census Tract 204.06, Block Group 3: 57.4% low-mod
- Census Tract 204.06, Block Group 4: 98.1% low-mod
- Census Tract 205.01, Block Group 1: 72.3% low-mod
- Census Tract 205.01, Block Group 2: 65.8% low-mod
- Census Tract 205.02, Block Group 1: 86.0% low-mod
- Census Tract 206.01, Block Group 1: 80.1% low-mod
- Census Tract 206.01, Block Group 4: 75.7% low-mod
- Census Tract 206.02, Block Group 1: 75.1% low-mod
- Census Tract 206.02, Block Group 3: 51.2% low-mod
- Census Tract 207.01, Block Group 1: 72.2% low-mod
- Census Tract 207.01, Block Group 2: 100% low-mod
- Census Tract 207.01, Block Group 3: 61.0% low-mod
- Census Tract 207.02, Block Group 1: 51.5% low-mod
- Census Tract 207.02, Block Group 2: 60.8% low-mod
- Census Tract 208, Block Group 2: 73.3% low-mod
- Census Tract 208, Block Group 3: 65.4% low-mod
- Census Tract 208, Block Group 4: 72.8% low-mod
- Census Tract 208, Block Group 5: 59.4% low-mod
- Census Tract 209.01, Block Group 1: 59.5% low-mod
- Census Tract 209.01, Block Group 2: 70.2% low-mod
- Census Tract 210.15, Block Group 1: 54.5% low-mod

Union County has an overall low-mod percentage of 35.09%.

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AP-50 Geographic Distribution - 91.220(f)

Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

The information below is a profile of the population, age, and racial/ethnic composition of Union County. This data was obtained from the 2019-2023 American Community Survey Five-Year Estimates, available on the U.S. Census Bureau website at https://data.census.gov. The ACS results were used to analyze the social, economic, housing, and general demographic characteristics of the County. These five-year estimates are the most recent data available for the County.

Population:

- The County population was 244,975 as of the 2019-2023 ACS, an increase of 8.1% since 2018.
- The County had 82,231 households as of the 2019-2023 ACS, an increase of 9.4% since 2018.
- There were 111,658 males (49.25%) and 115,036 females (50.75%) living in the County in 2023.

Age:

- The median age in Union County was 39.1 years old.
- Youth under age 18 comprised 26.0% of the population.
- Seniors aged 65 and over comprised 13.2% of the population.

Race/Ethnicity:

- 71.09% were White
- 11.18% were Black or African American
- 0.44% were American Indian and Alaska Native
- 4.08% were Asian
- 0.02% were Native Hawaiian and Other Pacific Islander
- 6.06% were Some Other Race
- 7.12% were Two or More Races
- 12.93% were Hispanic or Latino of any race

Income Profile:

The following is a summary of income statistics for Union County. At the time of the 2019-2023 American Community Survey, median household income in Union County was $99,243, significantly higher than the North Carolina statewide median ($69,904).

- 27.8% of households received Social Security income.
- 23.1% of households received retirement income.

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- 3.1% of households received Supplemental Security income.
- 1.6% of households received cash public assistance.

Low/Mod Income Profile:

The low- and moderate-income profile for Union County is a measurement of the area's needs. According to the HUD FY 2024 Low-Mod Summary Data, Union County has an overall low- and moderate-income percentage of 35.09%.

Economic Profile:

Union County, NC is a part of the Charlotte-Concord-Gastonia, NC-SC MSA. While the County is home to industry such as healthcare and advanced technology manufacturing, almost 40% of civilian employed residents are employed outside of the County.

The US Census On The Map Jobs Data for 2023 identified the three (3) largest sectors of jobs in Union County:

- **Education, Health Care, and Social Assistance –** 12,972 jobs (17.0% of jobs)
- **Manufacturing –** 11,876 jobs (15.6% of jobs)
- **Construction –** 10,910 jobs (13.5% of jobs)

These three categories represent 47.0% of the total number of jobs in the County.

As of December 2025 (the last available data), the US Bureau of Labor Statistics recorded an unadjusted unemployment rate in Union County of 3.1%. During the same month, the statewide unemployment rate was 3.4% and the national rate was 4.1%. However, 32.4% of Union County residents aged 16 and over were not in the labor force (according to the 2019-2023 ACS). This is a lower level of non-participation than statewide or nationally but is still a significant number of persons who do not or cannot work.

The 2019-2023 ACS estimates that 90.4% of Union County residents age 25 years or over had at least a high school diploma or equivalent. Only 67.6% had taken some college coursework, 48.0% had at least an associate's degree, and 39.0% had at least a bachelor's degree. The ACS notes that of those persons 25 years or over with earnings, high school graduates earned an annual median of $42,579 in 2023 adjusted dollars while those with some college education or an associate's degree earned a median of $50,438 and those with a bachelor's degree earned a median of $70,694. It will be essential for Union County to continue promoting post-secondary education and job training to attract businesses, while also helping its residents maintain their standard of living and retain their housing.

The County's civilian employed population 16 years and over was 123,262, but only 76,151 jobs were based in Union County. The only industry in which available jobs exceeded qualified workers was the **Wholesale Trade** field, with 435 more jobs than workers who lived in Union County. Every other industry

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had a surplus of qualified workers as compared to jobs available in the County, and the imbalance was especially high in traditionally "white-collar" higher-pay positions:

- **Agriculture, Forestry, Fishing and Hunting, and Mining** - 492 workers
- **Construction -** 628 workers
- **Manufacturing** - 2,244 workers
- **Retail Trade** - 5,796 workers
- **Transportation, Warehousing and Utilities –** 3,404 workers
- **Information** - 1,813 workers
- **Finance, Insurance, and Real Estate** - 10,863 workers
- **Professional, Scientific, Management, Administration and Waste Management –** 5,511 workers
- **Education, Health Care and Social Assistance -** 10,321 workers
- **Arts, Entertainment, Accommodations and Food Services -** 2,186 workers
- **Other Services** - 3,649 workers
- **Public Administration** - 649 workers

Since Union County has a low unemployment rate for its citizens, this indicates that it serves as a bedroom community for workers whose jobs are located elsewhere. The majority of these jobs are based elsewhere in the Charlotte Metropolitan Statistical Area.

Geographic Distribution

Target Area	Percentage of Funds
County-wide	100%

Table 58 - Geographic Distribution

Rationale for the priorities for allocating investments geographically

The County will continue to investigate barriers to affordable housing using data from the US Census, HUD, the Bureau of Labor Statistics, and other governmental and non-governmental information. Using this data as well as continued public input and information from stakeholder groups, the County will select the most appropriate activities to address and reduce the number of persons living in poverty.

Discussion

Union County has allocated its CDBG funds for FY 2026 based on which activities will benefit low- and moderate-income persons. The allocations and priorities were established by an online survey, stakeholder meetings, follow-up surveys from service providers, and public meetings. Obstacles to addressing underserved needs include finding more federal funding resources to accomplish activities and having local resources to pair with them to make successful projects.

At least 70% of the County's CDBG funds are budgeted to activities that principally benefit low- and moderate-income persons. The following guidelines for allocating HUD funding will be used for the FY 2026 Annual Action Plan:

- Public services are activities social service providers perform whose clientele are low- and moderate-income or in certain cases, limited clientele who are presumed to be low- and moderate-income such as the elderly or disabled.
- Public facilities are activities either located in a low- and moderate-income census tract/block group or have a low- and moderate-income service area benefit or clientele over 51% low- and moderate-income.
- Acquisitions and demolition activities are either located in a low- and moderate-income census area or activities which are eligible by preventing or eliminating slums and blight on a spot basis or area basis.
- Housing activities have income eligibility criteria and are considered direct benefit as the beneficiary must be income eligible. Applicants can be from throughout the County.
- Economic development projects will be located in a low- and moderate-income Block Group or a Block Group having greater than 20% poverty, be part of a redevelopment plan, or create jobs where at least 51% are available to low- and moderate-income residents.

The proposed activities funded through the FY 2026 CDBG Program Year are generally located in areas with the highest percentages of low- and moderate-income persons and those block groups with a percentage of minority persons above the average for Union County.

According to the 2019-2023 ACS data, Union County had a minority population of 32.0% of its total population (persons who are non-White and/or Hispanic or Latino). HUD defines a Minority Neighborhood as, "A neighborhood in which the percentage of persons of a particular racial or ethnic minority is at least 20 points higher than that minority's percentage in the housing market as a whole; the neighborhood's total percentage of minority persons is at least 20 points higher than the total percentage of minorities for the housing market area as a whole; or in the case of a metropolitan area, the neighborhood's total percentage of minority persons exceeds 50 percent of its population."

According to the 50% definition, there are twenty (20) Block Groups in the County that are considered a "Minority Neighborhood:"

- Census Tract 203.05, Block Group 1: 50.19% minority
- Census Tract 203.21, Block Group 1: 78.76% minority
- Census Tract 204.01, Block Group 1: 61.60% minority
- Census Tract 204.01, Block Group 2: 52.35% minority
- Census Tract 204.06, Block Group 1: 90.10% minority
- Census Tract 204.06, Block Group 2: 94.04% minority
- Census Tract 204.06, Block Group 4: 90.63% minority
- Census Tract 205.01, Block Group 1: 91.00% minority

- Census Tract 205.01, Block Group 2: 53.69% minority
- Census Tract 205.01, Block Group 3: 56.22% minority
- Census Tract 205.02, Block Group 1: 69.02% minority
- Census Tract 206.01, Block Group 1: 97.44% minority
- Census Tract 206.01, Block Group 2: 52.42% minority
- Census Tract 206.01, Block Group 4: 86.19% minority
- Census Tract 206.02, Block Group 1: 80.87% minority
- Census Tract 206.02, Block Group 3: 63.20% minority
- Census Tract 207.01, Block Group 3: 71.12% minority
- Census Tract 207.02, Block Group 1: 56.64% minority
- Census Tract 208, Block Group 4: 68.97% minority

The County uses the HUD definition of a low-mod area as any area with a population of low- and moderate-income residents that is equal to or greater than 51% of the entire population of the area. According to this definition, 32 of the 132 Block Groups within the County are considered low-mod areas:

- Census Tract 202.05, Block Group 2: 54.7% low-mod
- Census Tract 203.07, Block Group 1: 57.5% low-mod
- Census Tract 203.08, Block Group 4: 52.7% low-mod
- Census Tract 203.12, Block Group 1: 52.6% low-mod
- Census Tract 203.21, Block Group 1: 57.3% low-mod
- Census Tract 204.01, Block Group 2: 53.6% low-mod
- Census Tract 204.03, Block Group 1: 65.2% low-mod
- Census Tract 204.03, Block Group 3: 56.4% low-mod
- Census Tract 204.05, Block Group 1: 71.3% low-mod
- Census Tract 204.06, Block Group 1: 52.8% low-mod
- Census Tract 204.06, Block Group 2: 92.4% low-mod
- Census Tract 204.06, Block Group 3: 57.4% low-mod
- Census Tract 204.06, Block Group 4: 98.1% low-mod
- Census Tract 205.01, Block Group 1: 72.3% low-mod
- Census Tract 205.01, Block Group 2: 65.8% low-mod
- Census Tract 205.02, Block Group 1: 86.0% low-mod
- Census Tract 206.01, Block Group 1: 80.1% low-mod
- Census Tract 206.01, Block Group 4: 75.7% low-mod
- Census Tract 206.02, Block Group 1: 75.1% low-mod
- Census Tract 206.02, Block Group 3: 51.2% low-mod
- Census Tract 207.01, Block Group 1: 72.2% low-mod
- Census Tract 207.01, Block Group 2: 100% low-mod
- Census Tract 207.01, Block Group 3: 61.0% low-mod
- Census Tract 207.02, Block Group 1: 51.5% low-mod

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- Census Tract 207.02, Block Group 2: 60.8% low-mod
- Census Tract 208, Block Group 2: 73.3% low-mod
- Census Tract 208, Block Group 3: 65.4% low-mod
- Census Tract 208, Block Group 4: 72.8% low-mod
- Census Tract 208, Block Group 5: 59.4% low-mod
- Census Tract 209.01, Block Group 1: 59.5% low-mod
- Census Tract 209.01, Block Group 2: 70.2% low-mod
- Census Tract 210.15, Block Group 1: 54.5% low-mod

Union County has an overall low-mod percentage of 35.09%.

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Affordable Housing

AP-55 Affordable Housing - 91.220(g)

Introduction

The County will use CDBG funds to rehabilitate housing units to make them affordable, decent, safe, sanitary, accessible and sound. The one-year goals for affordable housing in Union County for FY 2026 are the following:

One Year Goals for the Number of Households to be Supported	
Homeless	0
Non-Homeless	10
Special-Needs	0
Total:	**10**

Table 59 - One Year Goals for Affordable Housing by Support Requirement

One Year Goals for the Number of Households Supported Through	
Rental Assistance	0
The Production of New Units	0
Rehab of Existing Units	10
Acquisition of Existing Units	0
Total:	**10**

Table 60 - One Year Goals for Affordable Housing by Support Type

Discussion

Union County will fund the following housing activities with FY 2026 CDBG funds:

- **CD-26-07 Habitat for Humanity - Individual Home Repair:** Union County, in partnership with Habitat for Humanity of Union County, will provide housing rehabilitation services to low- to moderate-income homeowners to address critical health and safety repairs such as roofing, HVAC systems, electrical and plumbing repairs, accessibility modifications, and septic or well system repairs, helping residents remain safely in their homes while preserving the existing affordable housing stock. Habitat for Humanity will serve as the subrecipient responsible for program implementation, including applicant intake, income qualification, construction management, and contractor oversight. All work will comply with CDBG and other HUD requirements, including environmental review and applicable construction standards.

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AP-60 Public Housing - 91.220(h)

Introduction

The Monroe Housing Authority (MHA) administers Section 8 Housing Choice Vouchers in Union County. Its partner nonprofit Community Advancement and Redevelopment Enterprise (CARE) operates the former MHA public housing properties as Rental Assistance Demonstration (RAD) Project-Based Voucher (PBV) residences. MHA is and will continue to be the primary resource for the County's very low-income households. As of its FY 2026 Draft Annual Plan, the Housing Authority administered 325 Tenant-Based Vouchers (TBV) and 39 Mainstream Vouchers for households with a disabled individual. CARE owns and operates units funded by 205 Project-Based Vouchers (PBV) at four properties.

Actions planned during the next year to address the needs of public housing

Between 2022 and 2024, the Monroe Housing Authority converted its portfolio of public housing units to Project-Based Voucher (PBV) units through the Rental Assistance Demonstration (RAD) program. The Rental Assistance Demonstration (RAD) program provides a powerful tool to preserve and improve affordable housing currently supported under the public housing, Section 8 Moderate Rehabilitation, Moderate Rehabilitation Single Room Occupancy, and Section 202 and Section 811 Rental Assistance Contract programs. Under RAD, properties are placed under a long-term rental assistance contract, providing long term affordability while maintaining and strengthening resident rights.

The 205 former MHA public housing units are now managed by MHA's partner nonprofit Community Advancement & Redevelopment Enterprise (CARE). The Monroe Housing Authority opted to take part in the RAD program to leverage both Federal and private capital funds to afford necessary upgrades and upkeep for its housing properties.

In terms of upcoming capital expenditures, CARE staff noted that they intend to install individual water meters for each housing unit rather than having a single-point water shutoff for each community, which will allow units to undergo water line repair and replacement without disruption to other tenants.

Actions to encourage public housing residents to become more involved in management and participate in homeownership

Monroe Housing Authority maintains a voluntary Family Self-Sufficiency (FSS) program that is available to households receiving a subsidy through MHA's HCV, PBV, and RAD-PBV programs. MHA households in compliance with MHA, CARE, and FSS regulations are eligible for FSS participation. The FSS program seeks to help families make progress toward economic security by supporting the family's efforts to increase their earned income, build financial capability, and achieve their financial goals. The following is a list of the supportive service needs of the families expected to enroll in the MHA FSS program:

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- Training in basic skills and executive function (including household management)
- Employment training, including sectoral training and contextualized and/or accelerated basic skills instruction
- Job placement assistance
- GED preparation
- Higher education guidance and support
- English as a Second Language
- Assistance in accessing and paying for child care
- Transportation assistance
- Financial coaching, including assistance with budgeting, banking, credit, debt, and savings
- Access to counseling or treatment for substance abuse and mental health
- Dental care, health care, and mental health care including substance abuse treatment and counseling
- Homeownership readiness

Upon enrollment in the Family Self-Sufficiency program, the FSS Coach will meet with the family to conduct an FSS needs assessment. This assessment will inform the development of the Individual Training and Services Plan (ISTP) and determine supportive services needed and/or barriers to overcome for the FSS family to achieve the goals outlined in the ISTPs to successfully complete the program. FSS Coaches may also utilize various financial assessments to assist participants to develop individual financial goals and determine what types of financial education and coaching are needed. Ongoing needs and financial assessments may be administered by the FSS Coach through regular participant outreach and engagement activities to inform any changes that need to be made to the ISP.

The Monroe Housing Authority's FSS Coaches will provide referrals to the following services as needed to help FSS participants achieve their goals:

- Assessment for educational and disability needs
- After-school child care (with Rising Star Daycare)
- Assistance with car repairs and purchase
- High School equivalency/GED (with Union County Public Schools)
- Child and Adult Protective Services
- Household management training
- Homeownership preparation
- Financial empowerment
- Individual Development Accounts
- Legal services
- Debt resolution and credit repair

According to the Housing Authority's Agency Plan, the housing authority is able to house applicants with disabilities in a reasonable time and has experienced no problems with finding units that fit the

accessibility needs of the disabled. Applicants are asked if any member of the household requires reasonable accommodation in order to access MHA programs or CARE facilities. If accommodation is required, MHA will work with the client to meet their needs. The housing authority is not fully aware of the client's specific needs until housing is available, at which point the household in need will coordinate with MHA/CARE staff to determine what reasonable accommodations can be provided.

All four of the CARE PBV communities have resident councils which meet monthly. MHA also offers periodic community activities at its CARE locations. Past activities have included free CPR courses, Back To School supply giveaways, and help with preparing family emergency plans for natural disasters such as hurricanes.

If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance

The Monroe Housing Authority is a "High Performer" and not a "troubled" Housing Authority. Not Applicable.

Discussion

Union County does not maintain nor support public housing. The Monroe Housing Authority (MHA) is the local entity with the sole responsibility for management and maintenance of public housing. MHA was established under the State of North Carolina General Statute 157 (Housing Authority Law) through a cooperation agreement with the City of Monroe, North Carolina on June 28, 1966. MHA administers the Section 8/Housing Choice Voucher (HCV) Programs funded through HUD for the City of Monroe and Union County.

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AP-65 Homeless and Other Special Needs Activities - 91.220(i)

Introduction

Union County is a member of Region 5 (the Piedmont Region) of the NC-503 North Carolina Balance of State Continuum of Care (BOSCoC). The BOSCoC is managed statewide by the North Carolina Coalition to End Homelessness (NCCEH). In its nine-county, three-region jurisdiction, the BOSCoC addresses the needs of the homeless. Locally, the CoC's activities are administered by the Community Shelter of Union County (UCCS). As a longtime partner of UCCS, the County works to coordinate activities with the Continuum of Care and supports applications for funding as well as working with other members to continue a network of supportive housing and services for the homeless.

Aside from UCCS, other members of the CoC include the County's Community Support & Outreach Department and nonprofits such as Turning Point, Inc. and Crisis Assistance Ministry. Using the Homeless Management Information System (HMIS) as a tool to provide services to homeless individuals and families, case managers are able to work with clients to identify their needs and challenges and provide unduplicated assistance. Case managers are the main contact for supportive services and housing.

According to the NC-503 Point-in-Time count conducted on the night of January 29, 2025, 177 persons were experiencing homelessness in Union County. While most homeless persons in the Charlotte MSA reside in Mecklenburg County or the City of Charlotte proper, Union County does have a significant unhoused population. This consists of both transient homeless persons along the US 74 corridor (often migrant workers seeking seasonal work) and long-term residents who have insufficient housing. For transient unhoused persons in particular, it is difficult to determine accurate numbers for how many people experience homelessness, how long a person has been homeless, and how many days they experience homelessness in a year. Based on the Point in Time (PIT) Survey, the Housing Inventory Count (HIC), and interviews with stakeholders, there is a need for additional year-round shelter space throughout the County. especially for subgroups like women, families with children, persons with mental and physical health concerns, and the chronically homeless.

The following goals and objectives for Union County's Homeless Priority have been identified for the five-year period of FY 2026 through FY 2030.

- **HO-1 Housing Opportunities** - Increase housing opportunities and living conditions for persons and families who are homeless or who are at risk of becoming homeless.
- **HO-2 Support and Management Services** - Promote and assist supportive and management services for public and non-profit agencies and organizations which assist persons who are homeless or who are at risk of becoming homeless.
- **HO-3 Homelessness Prevention** - Promote and assist in anti-eviction activities and work to resolve unfair housing practices which may contribute to homelessness.

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- **HO-4 Permanent Supportive Housing** - Promote and assist in the development of new permanent supportive housing opportunities for persons and families who are experiencing homelessness and who are exiting shelters and transitional housing programs.
- **HO-5 Shelter Housing** - Support and assist in the development of shelters and supportive training and educational programs for sheltered residents.

Based on the 2019-2023 ACS data, a total of 22,541 Union County civilian noninstitutionalized residents (9.2% of the population) have at least one disability and 31,636 residents (13.0%) are age 65 and over. Of the elderly population, 9,525 residents (3.9% of the County's total) are "frail elderly" who have at least one disability. It is expected that these populations will increase during the FY 2026-2030 Five-Year Consolidated Plan period. There will be a need to increase housing opportunities, services, and facilities for persons with special needs.

The following goals and objectives for Union County's Other Special Needs Priority have been identified for the five-year period of FY 2026 through FY 2030.

- **SN-1 Housing -** Increase the number of decent, safe, sound, sanitary, accessible and affordable units that are available and accessible to all sectors of the special needs populations.
- **SN-2 Accessibility -** Promote and assist in making accessibility improvements to existing housing units, including making reasonable accommodations for the physically disabled so they can continue to remain in their homes.
- **SN-3 Social Services -** Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.
- **SN-4 Removal of Architectural Barriers -** Remove architectural barriers which restrict the mobility and access to public facilities and services for persons with physical disabilities.

Describe the jurisdiction's one-year goals and actions for reducing and ending homelessness including: Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The Piedmont Region of the NC BOSCoC has an intake assessment process that identifies the additional services an individual or family may need and has created a streamlined referral process. The Piedmont Region covers five counties; in four of the counties, the emergency shelters act as the designated coordinated assessment sites in the County. These facilities are natural places for persons to seek help in the region. The assessment sites include Union County Community Shelter, Stanly County Community Inn, Crisis Ministry of Davidson County and Rowan Helping Ministries. Agencies in the region are committed to conducting the Emergency Response Screening in person for each individual or family that presents for shelter at any time.

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Financial Assistance

Union County Community Support and Outreach is the local administrator of the North Carolina Work First program, which helps resident children and families in temporary financial crisis achieve self-sufficiency through financial assistance, employment and supportive services. The program uses a strengths-based, family-centered approach. The program goals are: job readiness and employment; child well-being; economic self-sufficiency; and improved physical and mental health for families. To apply for Work First, families must provide documentation of identity, address or living arrangement, age, kinship, citizenship or legal alien status, Social Security number, income, and financial assets or resources.

Mental Health Services

Partners Health Management is a public local management entity/managed care organization (MCO) whose mission is to be a Member Care Organization. The organization offers health plans for Tailored Plan members, state-funded recipients, and NC Medicaid Direct beneficiaries in 15 North Carolina counties: Burke, Cabarrus, Catawba, Cleveland, Davidson, Davie, Forsyth, Gaston, Iredell, Lincoln, Rutherford, Stanly, Surry, Union and Yadkin. It prioritizes integrated-whole person care for our members and families, with a focus on mental health, substance use disorders, intellectual/developmental disabilities and traumatic brain injuries. Depending on client health plan, it covers services for behavioral health, I/DD, physical health and pharmacy.

Veterans Affairs

W.G. Hefner VA Medical Center in Salisbury, NC is the local veteran services provider with seventy-three (73) Permanent Supportive Housing beds for veterans. The SSVF program provides rapid rehousing and prevention services for veterans and their families. Rowan Helping Ministries in Salisbury maintains fourteen (14) beds for veterans, but Salisbury is over fifty miles from Monroe and there are no beds specifically set aside for veterans at the Union County Community Shelter. The Region 5 system utilizes the VA's hotline for veterans in need of assistance with housing, health care and mental health services. Veterans in need of assistance can either contact the State Veteran Service Center at 7508 E. Independence Blvd, Suite 119, Charlotte NC 28227, or the Union County Veterans Services Office in the County Government Building. The US Veterans Administration has designated Volunteers of America of the Carolinas, Inc. as the SSVF administrator for North Carolina.

Prevention Services

Households are able to access prevention services through linkages from service providers in the community. Veterans access SSVF by contacting the SSVF grantees in the BOSCoC. Volunteers of America of the Carolinas, Inc. is the administrator for SSVF in the Piedmont Region.

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Legal/Judicial System

The Union County Community Shelter (UCCS) has developed relationships with local law enforcement in the community. UCCS staff educates law enforcement on available services and how to make referrals for citizens that may show signs of being at risk.

Addressing the emergency shelter and transitional housing needs of homeless persons

Union County does not receive Emergency Solutions Grant (ESG) funding nor does it carry out shelter activities on its own. Local non-profit organizations such as Community Shelter of Union County and Turning Point, Inc. meet the emergency housing needs of homeless persons within the County. Neither the Community Shelter nor Turning Point currently operate transitional housing within their homeless services spectrum, and persons in need of transitional housing are directed by BOSCoC Piedmont Region staff to service providers outside of Union County.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again

Homeless needs are addressed in the community through the Union County Community Shelter and its partner organizations including Turning Point, Inc., Common Heart, and Union County Crisis Assistance Ministries. Union County also has representation in the Piedmont Region of the Balance of State Continuum of Care. The entry point for the homeless service provider system in Union County is through the Community Shelter of Union County. The long-term goal for new UCCS clients is for the client to return to independent living. This is accomplished through services including emergency shelter, food, rehousing, economic mobility, and post-housing services. Each client is assigned a case manager who works with the client to develop an individualized plan to obtain and maintain permanent housing.

Holistic case management is key to provision of services to address the needs of an individual or household. The ability to link a client to health and human service agencies, work toward increasing their income as well as improving financial skills is invaluable. Thrive! Union has identified the need to assist the chronic homeless in becoming self-sufficient by providing much needed resources. Using services such as Turning Point's Homeless Outreach Program to go to locations where the homeless congregate to provide information on available resources has been found to be a start in moving persons out of chronic homelessness.

Union County does not have a permanent day resource center for persons experiencing homelessness or unstable housing. A day shelter or resource center would provide unhoused persons with a single facility

where they can obtain healthcare, job assistance, laundry and hygiene facilities, and a place to stay warm or cool during extreme weather. While it does not intend to operate this type of facility on its own account, the County would like to investigate such a resource with its nonprofit and governmental partners.

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

Union County partners with local area nonprofits to help low-income individuals and families avoid homelessness. Subject to funding availability, Union County Crisis Assistance Ministries provides rent, mortgage, and/or utility assistance to low-income individuals and families to prevent homelessness. Other nonprofits, such as the ARC of Union County and the Council on Aging, work with their specialized populations to help prevent homelessness.

Partners Health Management is the Balance of State CoC Region 5 (Piedmont) area care manager of Medicaid and state-funded services for mental health treatment, intellectual and developmental disabilities, substance use disorders, and traumatic brain injuries in Union County and fourteen other central North Carolina counties. It does not directly provide treatment but ensures that providers meet strict quality standards, protect patient rights, and deliver medically necessary services. PHM also reviews appeals, hears complaints and ensures fair medical decisions.

Discussion

Part of the Charlotte MSA, Union County is split fairly evenly between suburban and rural areas. The large majority of its population lives in the west side of the County. The County seat of Monroe is in the center of Union County and is where most of the County's social service providers are based, though residents may also access services elsewhere in the Piedmont Region of the CoC.

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AP-75 Barriers to affordable housing - 91.220(j)

Introduction:

Union County takes seriously its responsibility to not only facilitate affordable housing and residential investment, but also to ensure its ordinances and policies do not interfere in residents' ability to obtain affordable housing. The County's Budget & Grants Management and Building Code Enforcement departments periodically review County Ordinances and Policies to ensure that they remain in compliance with Federal and State law, and that they do not present barriers to affordable housing.

Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment

In terms of publicly funded programs, the County will continue to promote, finance, and expand their Home Repair Program. The County will promote housing and utility assistance programs offered by nonprofit entities and may choose to support those programs with CDBG or other funding. It will also work with nonprofits to provide new or renovated housing for low-income families. The Monroe Housing Authority will continue to provide low-income eligible households with Section 8 vouchers to use at the property of their choice, and CARE will continue to maintain and operate their four Project-Based Voucher properties to provide high-quality housing for low-income County residents. Finally, the County's Planning & Development Department will continue to identify properties for rehabilitation, renovation, or demolition and new construction.

Discussion:

The largest barrier to housing choice in Union County is the high cost of housing that is affordable, decent, safe, sanitary, accessible and sound. This is compounded by the relatively low availability of rental housing and the very low amount of HUD-assisted housing. However, the County will also continue to monitor its policies, programs and ordinances and work with municipalities to ensure that government helps rather than hinders affordable housing availability.

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AP-85 Other Actions - 91.220(k)

Introduction:

This section discusses County and area nonprofit efforts in addressing underserved needs, expanding and preserving affordable housing, reducing lead-based paint hazards, and developing institutional structure for delivering housing and community development activities.

Actions planned to address obstacles to meeting underserved needs

Union County has allocated its CDBG funds for FY 2026 based on which activities will benefit low- and moderate-income persons. The allocations and priorities were established by an online survey, stakeholder meetings, follow-up surveys from service providers, and public meetings. Obstacles to addressing underserved needs include finding more federal funding resources to accomplish activities and having local resources to pair with them to make successful projects.

At least 70% of the County's CDBG funds are budgeted to activities that principally benefit low- and moderate-income persons. Additionally, whenever possible the County will work to leverage CDBG funds and continue to work to identify additional opportunities.

The following guidelines for allocating HUD funding will be used for the FY 2026 Annual Action Plan:

- Public services are activities social service providers perform whose clientele are low- and moderate-income or in certain cases, limited clientele who are presumed to be low- and moderate-income such as the elderly or disabled.
- Public facilities are activities either located in a low- and moderate-income census tract/block group or have a low- and moderate-income service area benefit or clientele over 51% low- and moderate-income.
- Acquisitions and demolition activities are either located in a low- and moderate-income census area or activities which are eligible by preventing or eliminating slums and blight on a spot basis or area basis.
- Housing activities have income eligibility criteria and are considered direct benefit as the beneficiary must be income eligible. Applicants can be from throughout the County.
- Economic development projects will be located in a low- and moderate-income Block Group or a Block Group having greater than 20% poverty, be part of a redevelopment plan, or create jobs where at least 51% are available to low- and moderate-income residents.

The proposed activities funded through the FY 2026 CDBG Program Year are generally located in areas with the highest percentages of low- and moderate-income persons and those block groups with a percentage of minority persons above the average for Union County.

Actions planned to foster and maintain affordable housing

The population of Union County has exploded after decades of little to no growth. Between the 1970 and 2020 U.S. Censuses, the County's population grew from 54,717 persons to 238,267 persons. Union County's proximity to the Charlotte, NC Metropolitan Area has led to its massive growth. The County's population has grown 433% since 1960 after decades of little to no growth, for a yearly growth rate of 7.2%. The majority of this growth occurred between 1990 and 2020. The growth of Union County area is largely due to its role as a bedroom community for the Charlotte-Concord-Gastonia, NC-SC Metropolitan Statistical Area overlaid with its historic farming and forestry industries.

This demand has vastly increased the pressure on the County's housing market, and even with the housing boom there is a large disparity between the cost of owner-occupied housing and the financial resources of low- and moderate-income households. To ease these housing pressures and disparities the County will encourage and support a well-planned, diverse housing environment, offering a mix of housing to all income groups and offering a safe and pleasant living environment. Neighborhoods will be strengthened through nurturing community spirit to create a sense of pride. The *Union County 2050* Comprehensive Plan outlines strategies that will help to garner public policy support and guide investment in affordable housing developments. Union County will also collaborate with its municipal partners to guide and regulate housing development, and to support the efforts of local non-profit housing providers who create and renovate affordable housing.

While the Plan addresses multiple areas, its primary areas of concern are traffic congestion, development density, rural character, agribusiness, flooding, safe drinking water, and broadband access. These all have either a direct or indirect impact on Union County's available affordable housing supply, from ensuring that affordable housing is sufficient and located in convenient areas without being overly concentrated, to making sure that in-person and remote jobs are available to residents.

Union County takes seriously its responsibility to not only facilitate affordable housing and residential investment, but also to ensure its ordinances and policies do not interfere in residents' ability to obtain affordable housing. The County's Budget & Grants Management and Building Code Enforcement departments periodically review County Ordinances and Policies to ensure that they remain in compliance with Federal and State law, and that they do not present barriers to affordable housing.

In terms of publicly funded programs, the County will continue to promote, finance, and expand its owner-occupied Home Repair Program. This public program has been effective in increasing the safety and efficiency of existing homes and reducing the cost burden for homeowners. The County's Building Code Enforcement Department will help to identify housing in need of rehabilitation. The County will also promote housing and utility assistance programs offered by nonprofit entities and will consider future CDBG funding applications from those organizations. It will continue to work with nonprofits to provide new or renovated housing to low-income families. The Monroe Housing Authority will continue to provide low-income eligible households with Section 8 vouchers to use at the property of their choice, and CARE will continue to maintain and operate their four Project-Based Voucher properties to provide high-quality

housing for low-income County residents. Finally, the County's Planning & Development Department will continue to identify properties for rehabilitation, renovation, or demolition and new construction.

There is a need to increase the supply of affordable, decent, safe, and sanitary housing for homebuyers, owners, and renters, and to protect their housing rights. To foster and maintain affordable housing, Union County proposes the following Housing Strategy activities:

- **HS-1 Housing Rehabilitation** - Conserve and rehabilitate owner- and renter-occupied affordable housing units across the County by addressing code violations, necessary repairs, energy conservation, utility improvements, and accessibility for persons with disabilities.
- **HS-2 Housing Construction** - Increase the supply of decent, safe and sanitary accessible housing that is affordable to low- and moderate-income homebuyers and renters in the County by providing funds for acquisition, development fees, infrastructure improvements, construction, rehabilitation, and redevelopment of vacant land and buildings.
- **HS-3 Homeownership** - Assist low- and moderate-income homebuyers in purchasing homes through down payment and closing cost assistance and associated housing counseling.
- **HS-4 Housing Assistance** - Provide funds for utility payments, deposits, and rental fees for low-income households who are faced with the threat of eviction or who may be at risk of becoming homeless.
- **HS-5 Fair Housing** - Continue to cooperate with housing agencies and organizations to ensure that Union County residents are aware of their legal rights and available fair housing resources.

Actions planned to reduce lead-based paint hazards

Lead poisoning affects many children age 6 or younger, causing lifelong learning and behavior problems by interfering in brain development. Though lead is a naturally occurring element, the largest source of lead contamination in the home is caused by chipping, peeling, flaking or deteriorating lead-based paint (LBP). Lead can also enter the home through some toys, jewelry, and other consumer products, lead potable water plumbing, contaminated soil from leaded gasoline and chemical processing, and industrial use of lead metal or chemicals. Lead poisoning has decreased over the years, but there is no safe level of lead. The only way to know if a child has been exposed is a blood test.

Lead was banned from residential paint in 1978 but approximately half of the U.S. housing stock still contains some lead-based paint. According to the 2017-2021 CHAS data, approximately 19.8% of the housing stock in Union County was built prior to 1980 which raises the risk of lead-based paint presence, and 3.3% of housing in Union County was constructed before 1980 and is inhabited by children age 6 or younger. Low-income tenants and owners are at proportionally higher risk of lead-based paint presence in their dwellings, as homeowners may be financially unable to conduct lead abatement and landlords are less willing to invest in renovating low-rent apartments.

The North Carolina Department of Health and Human Services (NC DHHS) Division of Public Health, Environmental Health Section monitors childhood lead exposure on the state level. State law does not

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require preemptive remediation but does require that property owners remediate lead paint and contaminated soil when there has been confirmed lead poisoning in a child less than six years old that occupies or regularly visits the property. This remediation can be through encapsulation or removal of lead-contaminated material, abandonment of the structure's use as a residence or childcare facility, or demolition of the structure with suitable containment measures. Property owners that choose to encapsulate or remove lead-based paint and lead-contaminated soil must follow a lead maintenance plan.

The NC DHHS Division of Public Health, Health Hazards Control Unit administers two lead-based paint programs in North Carolina: the Lead-Based Paint Hazard Management Program for Abatement Activities (LHMP) and the Lead-Based Paint Hazard Management Program for Renovation, Repair and Painting (LHMP-RRP). The LHMP requires a person who performs an inspection, risk assessment, abatement or abatement design work in a child-occupied facility (such as day care centers and preschools) or target housing (built before 1978) to be certified and establishes the requirements for certification, including the oversight of required training. It also requires a person who conducts an abatement of a child-occupied facility or target housing to obtain a permit for the abatement. Additionally, the LHMP-RRP program mandates that contractors, property managers and others working for compensation in homes and child-occupied facilities built before 1978 be trained and use lead-safe work practices. They are also required to provide the lead pamphlet "Renovate Right; Important Lead Hazard Information for Families, Child Care Providers and Schools" to owners and occupants before starting renovation work.

Beginning January 1, 2010, North Carolina law requires dust sampling technicians, firms, and individuals performing renovation, repair and painting projects for compensation who disturb lead-based paint in homes and child-occupied facilities built before 1978, be certified and follow specific work practices to prevent lead contamination. Child-occupied facilities include but are not limited to childcare facilities and schools with children under the age of 6 years of age that were built before 1978.

Until December 31, 2026, or until funds are exhausted, the Asbestos and Lead-Based Paint Reimbursement Program (funded through the American Rescue Plan of 2021) and the Clean Classrooms for Kids Program can reimburse up to two-thirds of the cost of abatement for eligible public schools, and up to 100% of the cost for licensed child care facilities. NC DHHS also maintains lists of accredited asbestos professionals and certified lead-based paint professionals for these institutions.

Union County provides educational materials about lead-based paint and other common hazards found in structures to all housing contractors and citizens receiving housing rehabilitation assistance. When the County provides CDBG funding for projects and activities, it uses the following policies and procedures to ensure lead compliance:

- Requiring Phase I environmental reports to include an analysis of lead-based paint if a project involves acquisition of pre-1978 multi-family projects.
- Requiring rehabilitation projects that involve identified lead-based paint issues to include mitigation activities in the work specification write-up.
- Educating the community on the dangers of lead poisoning through distribution of brochures.

Union County Environmental Health's Childhood Lead Prevention Program protects and improves the health of children from the harmful effects of lead through the implementation of the North Carolina Rules Governing Lead Poisoning Prevention in Children (15A NCAC 18A .3100). Union County Environmental Health coordinates and assists in the environmental investigation of children who have experienced lead poisoning. It also offers extensive resources on how to recognize lead poisoning, identifies common sources of lead in homes, and lists of both lead-certified contractors and physicians who can test children and pregnant women for lead exposure. The program has received recognition for its creative, community-driven approach to raising awareness about childhood lead poisoning prevention. This includes partnerships with local medical providers, targeted outreach to residents in Union County's historic home districts, and a Lead Prevention Story Time at the Union County Library.

Actions planned to reduce the number of poverty-level families

According to the 2019-2023 American Community Survey Data, approximately 7.7% of Union County residents were living in poverty, much lower than the 13.2% of North Carolina residents living in poverty. In Union County, female-headed households with children under 5 years are particularly affected with 13.5% living in poverty. The County's goal is to reduce the extent of poverty by 5%, based on actions the County and its nonprofit partners can control.

The County's median household income was $113,755 as of the 2019-2023 ACS, much higher than the North Carolina median household income of $86,947. Additionally, 57% of Union County residents had a household income of over $100,000. While this is an indicator of a comparatively wealthy county, it also reflects the fact that the population's income is stratified, and the lowest income persons do not necessarily earn a living wage. A high proportion of jobs available in the County are in the retail sector or in the arts, entertainment, accommodation and food service sectors, which tend to offer low-paying jobs. Positions in healthcare, management & administration usually require a bachelor's degree or higher which only 39.0% of the population 25 years and older possess, and higher-paying jobs in the manufacturing and construction fields that do not require college degrees are in relatively short supply. Additionally, the majority of high-paying jobs available to Union County residents also require a private automobile to access them, whether they are based in Union County or elsewhere in the greater Charlotte area. There is a need to increase employment, workforce development, self-sufficiency, educational training, and transportation options for residents of the County.

The main anti-poverty strategy for the County is to attract a range of businesses and support workforce development and job training for low- and moderate-income County residents. The County's strategy will also provide supportive services for targeted-income residents. Most of the priorities identified by the County will reduce poverty, but the following priorities specifically address anti-poverty actions:

- **HS-3 Homeownership** - Assist low- and moderate-income homebuyers in purchasing homes through down payment and closing cost assistance and associated housing counseling.

- **HS-4 Housing Assistance** - Provide funds for utility payments, deposits, and rental fees for low-income households who are faced with the threat of eviction or who may be at risk of becoming homeless.
- **HO-3 Homelessness Prevention** - Promote and assist in anti-eviction activities and work to resolve unfair housing practices which may contribute to homelessness.
- **CD-6 Clearance/Demolition** - Remove and eliminate slum and blighting conditions through demolition of vacant, abandoned, and dilapidated structures.
- **ED-1 Employment** - Support and encourage job creation, job retention, and job training opportunities in partnership with nonprofits and educational institutions.
- **ED-2 Development** - Support business and commercial growth through expansion and development including entrepreneurship and small business development in partnership with economic development organizations.
- **ED-3 Redevelopment** - Plan and promote the development, redevelopment, and revitalization of vacant commercial and industrial sites.
- **ED-4 Financial Assistance** - Support and encourage new economic development through local, state, and Federal tax incentives and programs such as Tax Incremental Financing (TIF), Local Economic Revitalization Tax Assistance (LERTA), Enterprise Zones/Entitlement Communities, Section 108 Loan Guarantees, Economic Development Initiative (EDI) funds, Opportunity Zones, Congressionally Directed Spending, etc.

Actions planned to develop institutional structure

There is an ever-increasing demand for services due to factors such as lack of employment opportunities, increasing cost of housing, persistent mental health and substance abuse challenges, and reductions in funding. Union County supports its homeless and at-risk population by working with its existing provider network. To strengthen this network, the County continues to participate in regional planning groups and forums such as Thrive! Union to foster collaboration with government agencies, nonprofit organizations, and other private and public service providers. This helps the County and its partners identify common goals and strategies to avoid overlaps in services and programs and identify potential for leveraging resources to close the needs gap.

The County's strategy for developing institutional structure includes the following:

- **HO-2 Support and Management Services** - Promote and assist supportive and management services for public and non-profit agencies and organizations which assist persons who are homeless or who are at risk of becoming homeless.
- **SN-3 Social Services -** Promote and support social service programs and facilities that address populations with special needs, including but not limited to the elderly, persons with disabilities, veterans, and victims of domestic violence.

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- **CD-3 Public Services** - Improve and enhance public services and programs for youth, the elderly, persons with disabilities, and general social/welfare public service programs for low- and moderate-income County residents.
- **AM-1 Overall Coordination** - Provide program management and oversight for the successful administration of Federal, State, and locally funded programs, including planning services for special studies, annual action plans, five-year consolidated plans, substantial amendments, consolidated annual performance and evaluation reports (CAPER), environmental reviews and clearances, fair housing, and compliance with all Federal, State, and local laws and regulations.

The strategy is based on information derived from the gaps/priorities identified initially through the work of the North Carolina Coalition to End Homelessness and refined through discussions with public and private stakeholders.

Actions planned to enhance coordination between public and private housing and social service agencies

Union County works with the following agencies to enhance coordination:

- **Monroe Housing Authority** - The County remains abreast of Monroe Housing Authority (MHA) activities, and County residents are appointed to the MHA Board of Commissioners by the Mayor of Monroe. MHA administers Section 8 Vouchers in the County and County. Additionally, MHA's nonprofit affiliate Community Advancement & Redevelopment Enterprises Inc. (CARE) operates four Project-Based Voucher (PBV) housing developments.
- **Community Shelter of Union County** - The County and the Community Shelter coordinate their efforts to ensure homeless persons have access to food and shelter. The County also provides Federal and local funds to the Community Shelter for operation and expansion.
- **Social Services Agencies** - The County provides funds to improve services for low- and moderate-income persons.
- **Housing Providers** - The County provides funds to rehabilitate and develop affordable housing and to provide housing options for low- and moderate-income households.

As part of the annual CDBG application process, local agencies and organizations are invited to submit proposals for CDBG funds for eligible activities. These groups participate in the planning process by attending the public hearings, participating in informational meetings, and completing survey forms.

Discussion:

The County's Budget & Grants Management Department is responsible for monitoring the Consolidated Plan and Annual Action Plans, including maintaining records on the progress toward meeting their goals and ensuring the statutory and regulatory compliance of each activity. The timeliness of expenditure is

achieved through scheduling activities, drawdown of funds, and budgets. Program modifications may be considered if project activities are not able to be completed within the allowable time limits of the grant. The County is also responsible for the ongoing monitoring of subrecipients for similar compliance. It will report its goal progress in a Consolidated Annual Performance and Evaluation Report (CAPER) following each Annual Action Plan period.

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Program Specific Requirements

AP-90 Program Specific Requirements - 91.220(l)(1,2,4)

Introduction:

Union County receives an annual allocation of CDBG funds. Since the County receives this federal allocation the questions below have been completed, as they are applicable.

Community Development Block Grant Program (CDBG)
Reference 24 CFR 91.220(l)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1.	The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	$0
2.	The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan	
3.	The amount of surplus funds from urban renewal settlements	
4.	The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan.	
5.	The amount of income from float-funded activities	
	Total Program Income	**$0**

Other CDBG Requirements

1.	The amount of urgent need activities	$0
2.	The estimated percentage of CDBG funds that will be used for activities that benefit persons of low- and moderate-income Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	100%

In FY 2026 Union County will receive $843,937.00 in CDBG funds. The County will budget $42,196.00 (5.0%) for General Program Administration and $126,590.00 (15.0%) for Public Services. For the FY 2026 Program Year, 100% of CDBG funds will be allocated to activities which benefit low- and moderate-income persons, which is above the 70% minimum requirement. No money (0%) has been allocated for slum and blight removal activities.

Discussion

The County solicits applications for CDBG funds; applications are sent out to a list of agencies, organizations, and housing providers that have previously submitted an application or which have expressed an interest in submitting an application. The application is reviewed by staff and any questions are discussed with the applicant.

Information on the Home Repair Program is available on the County's website. Applications are available and are accepted on a first-come first-served basis. Furthermore, County staff provides information throughout the County. This includes information pamphlets and workshops with realtors, mortgage lenders, and potential applicants.

CDBG Program Income:

Union County anticipates receiving no ($0) CDBG program income in FY 2026.

CDBG Percentages:

- Administrative Percentage: 5.0% (maximum of 20%)
- Public Service Percentage: 15.0% (maximum of 15%)
- Low and Moderate-Income Percentage: 100% (minimum of 70%)
- Slum and Blight Activities Percentage: 0% (maximum of 30%)

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Exhibits

Attached to this Five-Year Consolidated Plan are the following documents:

- SF 424 Forms
- Certifications
- First Public Hearing
- Second Public Hearing
- Resident Surveys
- Agency/Organization Surveys
- Agency/Organization Meetings
- Resolution

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Union County, NC

Staff Report

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-308 **Agenda Date:** 6/1/2026

TITLE:

Minutes for Approval

INFORMATION CONTACT:

Lynn G. West, Clerk to the Board of Commissioners, 704-283-3853

ACTION REQUESTED:

Approve minutes

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Draft minutes have been sent to the Commissioners for review.

FINANCIAL IMPACT:

None

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-293 **Agenda Date:** 6/1/2026

TITLE:

Human Resources Reports for April 2026

INFORMATION CONTACT:

Julie Broome, Human Resources, Director, 704-283-3869

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

These reports include all new hires, separations from service, and retirements for Union County Local Government for the month of April 2026.

FINANCIAL IMPACT:

None.

UNION COUNTY PERSONNEL REPORT
REPORT OF NEW HIRES

April 2026

Name	Hire Date	Position
BOARD OF ELECTIONS		
MATTHEW J CHILDS	4/18/26	ONE STOP OFFICE SUPPORT
FLEET MANAGEMENT		
FAYE Y EVERALL	4/6/26	ADMINISTRATIVE PROFESSIONAL II
HS - BUSINESS OPERATIONS		
DARBY P SAMES	4/6/26	CUSTOMER SERVICE SPECIALIST
HS - PUBLIC HEALTH		
CRYSTAL L CRAWFORD	4/6/26	PUBLIC HEALTH NURSE
HS - SOCIAL SERVICES		
CARIDAD BLANCO	4/20/26	SCHOOL SOCIAL WORKER
HS - TRANSPORTATION		
AUBREY V ROGERS	4/6/26	TRANSPORTATION DRIVER BPT
GREGORY M SLEDGE	4/20/26	TRANSPORTATION DRIVER PT
PARKS AND RECREATION		
ALISON L METZ	4/11/26	PARK ATTENDANT - SEASONAL
MASON B CARNES	4/19/26	PARK ATTENDANT - SEASONAL
PUBLIC LIBRARY		
VIGNESH SRIRAM	4/20/26	LIBRARY ASSOCIATE PT
SHERIFF/JAIL/FAC 80.5 HRS		
SAMUEL GONZALEZ	4/6/26	DETENTION OFFICER
SKYLA B HANNAH	4/6/26	DETENTION OFFICER
STEPHEN D MARSH	4/6/26	DEPUTY SHERIFF
BRANDON C STANLEY	4/20/26	DETENTION OFFICER
TA - ASSESSMENT		
CHRISTINE M MANGONE	4/6/26	REAL ESTATE APPRAISER I
UCW - UTILITY BUSINESS SVCS		
COLTON E DONOVAN	4/6/26	AMI TECHNICIAN
UCW - WATER & WASTEWATER OPS		
JOSE M HIRALDO SANCHEZ	4/20/26	UTILITY TECHNICIAN I
COLLIN H O'KEEF	4/20/26	WASTEWATER TRT PLANT OP I

UNION COUNTY PERSONNEL REPORT
REPORT OF RETIREES AND SEPARATIONS FROM SERVICE

April 2026

Name	Hire Date	Separation Date	Position
RETIREES			
BUILDING CODE ENFORCEMENT			
JAMES M WILKERSON	9/12/11	4/30/26	BUILDING INSPECTOR SUPERVISOR
UCW - WATER & WASTEWATER OPS			
TIMOTHY J HARRELL	7/7/18	4/30/26	WASTEWATER TRT PLANT OP IV
SEPARATION FROM SERVICE			
BOARD OF COMMISSIONERS			
GARY M SIDES	12/2/24	4/6/26	BOARD OF COUNTY COMMISSIONERS
COOPERATIVE EXTENSION			
ARIANA M ESPINOSA CEDENO	3/9/26	4/30/26	INTERN
HAILEY ROJAS	3/9/26	4/30/26	INTERN
COUNTY MANAGER'S OFFICE			
MELANY L PAIZ HONG	3/9/26	4/30/26	INTERN
HS - PUBLIC HEALTH			
MARIA A VERMETTE	2/24/25	4/8/26	PUBLIC HEALTH NURSE
HS - SOCIAL SERVICES			
DIAHNA C WALLACE	8/28/23	4/30/26	SOCIAL WORKER
FAYTH C FARQUHAR	10/20/25	4/2/26	ELIGIBILITY SPECIALIST
SECURITY & RISK MANAGEMENT			
VINCENT C SCIASCIA	11/4/24	4/24/26	RISK MANAGER
SHERIFF/JAIL/FACILITIES			
DONALD B CHRISTIAN	10/14/19	4/8/26	SHERIFF'S LEGAL COUNSEL
EMILY E TANCREDI	3/24/25	4/16/26	EVIDENCE TECHNICIAN
SOLID WASTE			
HARRY T MCLENDON	2/12/24	4/24/26	EQUIPMENT OPERATOR
UCW - WATER & WASTEWATER OPS			
SAMUEL W HALL	4/12/21	4/2/26	UTILITY TECHNICIAN II
MCKINLEY E LAVERY	8/25/25	4/30/26	UTILITY TECHNICIAN I
COLLIN H O'KEEF	4/20/26	4/22/26	WASTEWATER TRT PLANT OP I

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-297 **Agenda Date:** 6/1/2026

TITLE:

Tax Refunds, Releases and Prorations Approved by Finance Officer

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than $100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for April 2026 NCVTS releases and refunds less than $100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
ASBERRY, BRIANA MARIE TYSON	ASBERRY, BRIANA MARIE TYSON	ASBERRY, JUSTIN MICHAEL	1125 TRAYWICK RD		MARSHVILLE, NC 28103	Proration	0077255039	RE4107	AUTHORIZED	736479888	Refund Generated due to proration on Bill #0077255039-2024-2024-0000-00	Vehicle Sold	4/14/2026	4/15/2026	001	TAX	($12.94)	$0.00	($12.94)
															017	TAX	($4.66)	$0.00	($4.66)
															003	TAX	($1.39)	$0.00	($1.39)
															005	TAX	($0.31)	$0.00	($0.31)
															004	TAX	($2.31)	$0.00	($2.31)
															002	TAX	($29.67)	$0.00	($29.67)
																		Refund	**$51.28**
BAJ MOTORSPORTS LLC	BAJ MOTORSPORTS LLC		8804 UNIONVILLE BRIEF RD		MONROE, NC 28110	Proration	0064574015	JMF2526	AUTHORIZED	857108021	Refund Generated due to proration on Bill #0064574015-2025-2025-0000-00	Vehicle Sold	4/2/2026	4/6/2026	001	TAX	($92.18)	$0.00	($92.18)
															930	TAX	($16.40)	$0.00	($16.40)
															016	TAX	($46.33)	$0.00	($46.33)
															003	TAX	($8.69)	$0.00	($8.69)
															005	TAX	($3.69)	$0.00	($3.69)
															004	TAX	($31.90)	$0.00	($31.90)
															002	TAX	($219.63)	$0.00	($219.63)
																		Refund	**$418.82**
BECK, BRYON REID	BECK, BRYON REID		595 LANDSBURY DR		WAXHAW, NC 28173	Adjustment < $100	0090021952	AA3288E	PENDING	858620042	Refund Generated due to adjustment on Bill #0090021952-2025-2025-0000-00	Situs error	4/10/2026		001	TAX	($6.63)	$0.00	($6.63)
															800	TAX	($2.07)	$0.00	($2.07)
															026	TAX	($1.80)	$0.00	($1.80)
															003	TAX	($0.62)	$0.00	($0.62)
															005	TAX	($0.26)	$0.00	($0.26)
															004	TAX	($2.30)	$0.00	($2.30)
															002	TAX	($15.79)	$0.00	($15.79)
																		Refund	**$29.47**
BEDELL, DOROTHEA BARNETTE	BEDELL, DOROTHEA BARNETTE		9607 MILL GROVE RD		INDIAN TRAIL, NC 28079	Proration	0079081612	YRZ2562	AUTHORIZED	736480014	Refund Generated due to proration on Bill #0079081612-2025-2025-0000-00	Vehicle Sold	4/14/2026	4/15/2026	001	TAX	($8.49)	$0.00	($8.49)
															016	TAX	($4.27)	$0.00	($4.27)
															003	TAX	($0.80)	$0.00	($0.80)
															005	TAX	($0.34)	$0.00	($0.34)
															004	TAX	($2.94)	$0.00	($2.94)
															002	TAX	($20.23)	$0.00	($20.23)
																		Refund	**$37.07**
BELANGER, ROBERT GERARD	BELANGER, ROBERT GERARD		4509 WAXHAW FARM RD		WAXHAW, NC 28173	Proration	0028641862	XVK1799	AUTHORIZED	985191920	Refund Generated due to proration on Bill #0028641862-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($0.52)	$0.00	($0.52)
															500	TAX	($1.35)	$0.00	($1.35)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($0.22)	$0.00	($0.22)
															003	TAX	($0.05)	$0.00	($0.05)
															005	TAX	($0.02)	$0.00	($0.02)
															004	TAX	($0.18)	$0.00	($0.18)
															002	TAX	($1.25)	$0.00	($1.25)
																		Refund	**$3.59**
BELANGER, ROBERT GERARD JR	BELANGER, ROBERT GERARD JR		4509 WAXHAW FARMS RD		WAXHAW, NC 28173	Proration	0028641887	TMS2467	AUTHORIZED	985191904	Refund Generated due to proration on Bill #0028641887-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($2.21)	$0.00	($2.21)
															500	TAX	($5.70)	$0.00	($5.70)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($0.90)	$0.00	($0.90)
															003	TAX	($0.21)	$0.00	($0.21)
															005	TAX	($0.09)	$0.00	($0.09)
															004	TAX	($0.76)	$0.00	($0.76)
															002	TAX	($5.26)	$0.00	($5.26)
																		Refund	**$15.13**
BLALOCK, KELLEY TODD	BLALOCK, KELLEY TODD	BLALOCK, LISA COOK	4803 HOLLY SCHOOL RD		MARSHVILLE, NC 28103	Proration	0081211715	BLAL0CK2	AUTHORIZED	738894816	Refund Generated due to proration on Bill #0081211715-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($35.45)	$0.00	($35.45)
															017	TAX	($22.49)	$0.00	($22.49)
															003	TAX	($3.35)	$0.00	($3.35)
															005	TAX	($1.42)	$0.00	($1.42)
															004	TAX	($12.26)	$0.00	($12.26)
															002	TAX	($84.44)	$0.00	($84.44)
																		Refund	**$159.41**
BLANTON, DWAYNE THOMAS	BLANTON, DWAYNE THOMAS		8924 KENTUCKY DERBY DR		WAXHAW, NC 28173	Proration	0088327306	KFF4447	AUTHORIZED	737702580	Refund Generated due to proration on Bill #0088327306-2025-2025-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($22.03)	$0.00	($22.03)
															026	TAX	($5.96)	$0.00	($5.96)
															003	TAX	($2.08)	$0.00	($2.08)
															005	TAX	($0.88)	$0.00	($0.88)
															004	TAX	($7.63)	$0.00	($7.63)
															002	TAX	($52.49)	$0.00	($52.49)
																		Refund	**$91.07**
BOSOVETS, EDUARD	BOSOVETS, EDUARD		601 PICKETTS CIR		INDIAN TRAIL, NC 28079	Proration	0084225686	VDX3232	AUTHORIZED	857814741	Refund Generated due to proration on Bill #0084225686-2024-2024-0000-00	Vehicle Sold	4/6/2026	4/7/2026	001	TAX	($14.92)	$0.00	($14.92)
															600	TAX	($16.91)	$0.00	($16.91)
															019	TAX	($5.83)	$0.00	($5.83)
															003	TAX	($1.60)	$0.00	($1.60)
															005	TAX	($0.36)	$0.00	($0.36)
															004	TAX	($2.67)	$0.00	($2.67)
															002	TAX	($34.21)	$0.00	($34.21)
																		Refund	**$76.50**

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
BOWMAN, SUZETTE GAIL	BOWMAN, SUZETTE GAIL		1007 NUTGROVE LN		INDIAN TRAIL, NC 28079	Proration	0047683236	DJJ1449	AUTHORIZED	860891325	Refund Generated due to proration on Bill #0047683236-2024-2024-0000-00	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($2.61)	$0.00	($2.61)
															600	TAX	($2.95)	$0.00	($2.95)
															026	TAX	($0.64)	$0.00	($0.64)
															003	TAX	($0.28)	$0.00	($0.28)
															005	TAX	($0.06)	$0.00	($0.06)
															004	TAX	($0.47)	$0.00	($0.47)
															002	TAX	($5.97)	$0.00	($5.97)
																		Refund	$12.98
BRADSHAW, TIMOTHY SCOTT	BRADSHAW, TIMOTHY SCOTT		520 BIVENS ST		WINGATE, NC 28174	Proration	0074538291	TSB1961	AUTHORIZED	981280208	Refund Generated due to proration on Bill #0074538291-2025-2025-0000-00	Vehicle Sold	4/10/2026	4/16/2026	001	TAX	($18.31)	$0.00	($18.31)
															300	TAX	($40.72)	$0.00	($40.72)
															300	VEHICLE FEE	$0.00	$0.00	$0.00
															022	TAX	($11.71)	$0.00	($11.71)
															003	TAX	($1.72)	$0.00	($1.72)
															005	TAX	($0.73)	$0.00	($0.73)
															004	TAX	($6.34)	$0.00	($6.34)
															002	TAX	($43.63)	$0.00	($43.63)
																		Refund	$123.16
BREWER, SETH CURTIS	BREWER, SETH CURTIS		805 DEERCROSS LN		WAXHAW, NC 28173	Proration	0051500557	YRWEHERE	AUTHORIZED	735959904	Refund Generated due to proration on Bill #0051500557-2025-2025-0000-00	Vehicle Sold	4/10/2026	4/16/2026	001	TAX	($17.46)	$0.00	($17.46)
															026	TAX	($4.72)	$0.00	($4.72)
															003	TAX	($1.65)	$0.00	($1.65)
															005	TAX	($0.70)	$0.00	($0.70)
															004	TAX	($6.04)	$0.00	($6.04)
															002	TAX	($41.61)	$0.00	($41.61)
																		Refund	$72.18
BRIGGS, MICHAEL	BRIGGS, MICHAEL	BRIGGS, STEPHANIE MARIE	9123 LANCASTER HWY		WAXHAW, NC 28173	Proration	0081148508	LFM1212	AUTHORIZED	738348570	Refund Generated due to proration on Bill #0081148508-2025-2025-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($5.12)	$0.00	($5.12)
															025	TAX	($2.03)	$0.00	($2.03)
															003	TAX	($0.48)	$0.00	($0.48)
															005	TAX	($0.21)	$0.00	($0.21)
															004	TAX	($1.77)	$0.00	($1.77)
															002	TAX	($12.19)	$0.00	($12.19)
																		Refund	$21.80
BUTLER, WILLIAM SCOTT	BUTLER, WILLIAM SCOTT		1259 EGRETS PT		HARTSIVLLE, SC 29550	Proration	0086146571	RKV9514	AUTHORIZED	858131582	Refund Generated due to proration on Bill #0086146571-2025-2025-0000-00	Vehicle Sold	4/8/2026	4/9/2026	001	TAX	($3.69)	$0.00	($3.69)
															600	TAX	($5.58)	$0.00	($5.58)
															019	TAX	($1.63)	$0.00	($1.63)
															003	TAX	($0.35)	$0.00	($0.35)
															005	TAX	($0.15)	$0.00	($0.15)
															004	TAX	($1.28)	$0.00	($1.28)
															002	TAX	($8.79)	$0.00	($8.79)
																		Refund	$21.47
CABRERA, VANESSA	CABRERA, VANESSA		318 WHARTON ST		MONROE, NC 28110	Proration	0069623606	PEV6252	AUTHORIZED	860889841	Refund Generated due to proration on Bill #0069623606-2025-2025-0000-00	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($12.64)	($0.64)	($13.28)
															200	TAX	($49.49)	($2.47)	($51.96)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.19)	($0.05)	($1.24)
															005	TAX	($0.50)	($0.03)	($0.53)
															004	TAX	($4.37)	($0.22)	($4.59)
															002	TAX	($30.12)	($1.50)	($31.62)
																		Refund	$103.22
CAMPBELL LOMBARDI, RACHEL LAUREN	CAMPBELL LOMBARDI, RACHEL LAUREN		9002 BRAD CT		MATTHEWS, NC 28104	Proration	0080770280	TCA1858	AUTHORIZED	981929192	Refund Generated due to proration on Bill #0080770280-2025-2025-0000-00	Vehicle Sold	4/13/2026	4/14/2026	001	TAX	($11.80)	$0.00	($11.80)
															700	TAX	($19.84)	$0.00	($19.84)
															700	VEHICLE FEE	$0.00	$0.00	$0.00
															020	TAX	($4.85)	$0.00	($4.85)
															003	TAX	($1.12)	$0.00	($1.12)
															005	TAX	($0.47)	$0.00	($0.47)
															004	TAX	($4.08)	$0.00	($4.08)
															002	TAX	($28.12)	$0.00	($28.12)
																		Refund	$70.28
CAMPBELL, NATHAN RUSSELL	CAMPBELL, NATHAN RUSSELL		1116 WILLOUGHBY RD		MONROE, NC 28110	Proration	0027415454	WNC7446	AUTHORIZED	738895374	Refund Generated due to proration on Bill #0027415454-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($1.83)	$0.00	($1.83)
															026	TAX	($0.49)	$0.00	($0.49)
															003	TAX	($0.17)	$0.00	($0.17)
															005	TAX	($0.07)	$0.00	($0.07)
															004	TAX	($0.63)	$0.00	($0.63)
															002	TAX	($4.35)	$0.00	($4.35)
																		Refund	$7.54
CARLTON, STEVE TROY	CARLTON, STEVE TROY	CARLTON, ELIZABETH ANNE	6385 CELTIC XING		HARTFORD, WI 53027	Proration	0075130327	KMC8550	AUTHORIZED	857845156	Refund Generated due to proration on Bill #0075130327-2025-2025-0000-00	Reg . Out of state	4/7/2026	4/8/2026	001	TAX	($20.82)	$0.00	($20.82)
															970	TAX	($4.17)	$0.00	($4.17)
															026	TAX	($5.63)	$0.00	($5.63)
															003	TAX	($1.97)	$0.00	($1.97)
															005	TAX	($0.83)	$0.00	($0.83)
															004	TAX	($7.20)	$0.00	($7.20)
															002	TAX	($49.61)	$0.00	($49.61)
																		Refund	$90.23

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
CARPENTER, BRIAN SCOTT	CARPENTER, BRIAN SCOTT		908 SWEET PEA ST		MONROE, NC 28110	Proration	0042586638	PJV9341	AUTHORIZED	860651169	Refund Generated due to proration on Bill #0042586638-2024-2024-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($0.67)	$0.00	($0.67)
															200	TAX	($2.06)	$0.00	($2.06)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.07)	$0.00	($0.07)
															005	TAX	($0.01)	$0.00	($0.01)
															004	TAX	($0.12)	$0.00	($0.12)
															002	TAX	($1.53)	$0.00	($1.53)
																		Refund	$4.46
CHESTER, JOHN AUBREY	CHESTER, JOHN AUBREY		515 CONAWAY CT		WAXHAW, NC 28173	Proration	0083430399	REW7001	AUTHORIZED	859490807	Refund Generated due to proration on Bill #0083430399-2024-2024-0000-00	Vehicle Totalled	4/15/2026	4/16/2026	001	TAX	($6.40)	$0.00	($6.40)
															970	TAX	($0.65)	$0.00	($0.65)
															026	TAX	($1.56)	$0.00	($1.56)
															003	TAX	($0.69)	$0.00	($0.69)
															005	TAX	($0.15)	$0.00	($0.15)
															004	TAX	($1.14)	$0.00	($1.14)
															002	TAX	($14.68)	$0.00	($14.68)
																		Refund	$25.27
COAN, PRESTIN TATE	COAN, PRESTIN TATE		5315 LAKE GLENN DR		STANFIELD, NC 28163	Proration	0084502164	VN8737	AUTHORIZED	735959796	Refund Generated due to proration on Bill #0084502164-2024-2024-0000-00	Vehicle Sold	4/10/2026	4/16/2026	001	TAX	($19.31)	$0.00	($19.31)
															017	TAX	($6.96)	$0.00	($6.96)
															003	TAX	($2.07)	$0.00	($2.07)
															005	TAX	($0.46)	$0.00	($0.46)
															004	TAX	($3.46)	$0.00	($3.46)
															002	TAX	($44.28)	$0.00	($44.28)
																		Refund	$76.54
CRAIGIE, KYLE MARTIN	CRAIGIE, KYLE MARTIN	CRAIGIE, CONNIE BROWNING	3531 SAVANNAH WAY		MONROE, NC 28110	Proration	0074563771	EHJ4153	AUTHORIZED	857107160	Refund Generated due to proration on Bill #0074563771-2025-2025-0000-00	Vehicle Totalled	4/2/2026	4/6/2026	001	TAX	($8.99)	$0.00	($8.99)
															200	TAX	($35.20)	$0.00	($35.20)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.85)	$0.00	($0.85)
															005	TAX	($0.36)	$0.00	($0.36)
															004	TAX	($3.11)	$0.00	($3.11)
															002	TAX	($21.42)	$0.00	($21.42)
																		Refund	$69.93
CURYLO, ROBERT BLAINE	CURYLO, ROBERT BLAINE		6103 ABERGELE LN		MATTHEWS, NC 28104	Proration	0057789019	HB4494	AUTHORIZED	982548416	Refund Generated due to proration on Bill #0057789019-2025-2025-0000-00	Vehicle Sold	4/16/2026	4/17/2026	001	TAX	($11.93)	$0.00	($11.93)
															700	TAX	($20.07)	$0.00	($20.07)
															700	VEHICLE FEE	$0.00	$0.00	$0.00
															023	TAX	($4.53)	$0.00	($4.53)
															003	TAX	($1.13)	$0.00	($1.13)
															005	TAX	($0.48)	$0.00	($0.48)
															004	TAX	($4.12)	$0.00	($4.12)
															002	TAX	($28.43)	$0.00	($28.43)
																		Refund	$70.69
DEERE, JOHN ALAN JR	DEERE, JOHN ALAN JR		2206 FLAGSTICK DR		MATTHEWS, NC 28104	Proration	0089502740	MBD4031	AUTHORIZED	985250416	Refund Generated due to proration on Bill #0089502740-2025-2025-0000-00	Vehicle Sold	4/28/2026	4/29/2026	001	TAX	($10.94)	$0.00	($10.94)
															700	TAX	($18.38)	$0.00	($18.38)
															700	VEHICLE FEE	$0.00	$0.00	$0.00
															023	TAX	($4.15)	$0.00	($4.15)
															003	TAX	($1.03)	$0.00	($1.03)
															005	TAX	($0.44)	$0.00	($0.44)
															004	TAX	($3.79)	$0.00	($3.79)
															002	TAX	($26.04)	$0.00	($26.04)
																		Refund	$64.77
DELCO, TERESA THREATT	DELCO, TERESA THREATT		854 T J DR		MONROE, NC 28112	Proration	0063081675	TEF5261	AUTHORIZED	856601158	Refund Generated due to proration on Bill #0063081675-2025-2025-0000-00	Vehicle Totalled	4/1/2026	4/2/2026	001	TAX	($10.97)	$0.00	($10.97)
															200	TAX	($42.93)	$0.00	($42.93)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.03)	$0.00	($1.03)
															005	TAX	($0.44)	$0.00	($0.44)
															004	TAX	($3.80)	$0.00	($3.80)
															002	TAX	($26.13)	$0.00	($26.13)
																		Refund	$85.30
DESMEDT, JOHN JAMES	DESMEDT, JOHN JAMES		722 GALWAY CT		MATTHEWS, NC 28104	Proration	0063091113	JAR5140	AUTHORIZED	978971368	Refund Generated due to proration on Bill #0063091113-2025-2025-0000-00	Vehicle Sold	4/1/2026	4/2/2026	001	TAX	($13.73)	$0.00	($13.73)
															700	TAX	($23.09)	$0.00	($23.09)
															700	VEHICLE FEE	$0.00	$0.00	$0.00
															023	TAX	($5.22)	$0.00	($5.22)
															003	TAX	($1.29)	$0.00	($1.29)
															005	TAX	($0.55)	$0.00	($0.55)
															004	TAX	($4.75)	$0.00	($4.75)
															002	TAX	($32.72)	$0.00	($32.72)
																		Refund	$81.35
EISENBERG, GORDON HOWARD	EISENBERG, GORDON HOWARD		1213 FOXFIELD RD		WAXHAW, NC 28173	Proration	0053997108	HDH5274	AUTHORIZED	737906904	Refund Generated due to proration on Bill #0053997108-2024-2024-0000-00	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($13.92)	$0.00	($13.92)
															026	TAX	($3.40)	$0.00	($3.40)
															003	TAX	($1.49)	$0.00	($1.49)
															005	TAX	($0.33)	$0.00	($0.33)
															004	TAX	($2.49)	$0.00	($2.49)
															002	TAX	($31.92)	$0.00	($31.92)
																		Refund	$53.55

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
EVANS, DOUGLAS PHILLIP	EVANS, DOUGLAS PHILLIP		1618 CRESTGATE DR		WAXHAW, NC 28173	Proration	0071571588	KDX3830	AUTHORIZED	861407155	Refund Generated due to proration on Bill #0071571588-2024-2024-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($22.98)	$0.00	($22.98)
															970	TAX	($2.32)	$0.00	($2.32)
															026	TAX	($5.61)	$0.00	($5.61)
															003	TAX	($2.46)	$0.00	($2.46)
															005	TAX	($0.55)	$0.00	($0.55)
															004	TAX	($4.11)	$0.00	($4.11)
															002	TAX	($52.70)	$0.00	($52.70)
																		Refund	$90.73
FAIRWAY FORMS AND PRINTING INC	FAIRWAY FORMS AND PRINTING INC		7000 STINSON HARTIS RD	STE A	INDIAN TRAIL, NC 28079	Proration	0062246669	YRZ3893	AUTHORIZED	860890121	Refund Generated due to proration on Bill #0062246669-2025-2025-0000-00	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($15.09)	$0.00	($15.09)
															600	TAX	($22.83)	$0.00	($22.83)
															023	TAX	($5.73)	$0.00	($5.73)
															003	TAX	($1.42)	$0.00	($1.42)
															005	TAX	($0.61)	$0.00	($0.61)
															004	TAX	($5.22)	$0.00	($5.22)
															002	TAX	($35.95)	$0.00	($35.95)
																		Refund	$86.85
FORD, SYREETA ANDREA	FORD, SYREETA ANDREA		4005 SHADOW PINES CIR		INDIAN TRAIL, NC 28079	Proration	0017926921	0987DS	AUTHORIZED	860651596	Refund Generated due to proration on Bill #0017926921-2024-2024-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($2.91)	$0.00	($2.91)
															600	TAX	($3.30)	$0.00	($3.30)
															023	TAX	($0.91)	$0.00	($0.91)
															003	TAX	($0.31)	$0.00	($0.31)
															005	TAX	($0.07)	$0.00	($0.07)
															004	TAX	($0.52)	$0.00	($0.52)
															002	TAX	($6.67)	$0.00	($6.67)
																		Refund	$14.69
GARCIA DEARA, JUAN MANUEL	GARCIA DEARA, JUAN MANUEL		2920 OLD CHARLOTTE HWY		MONROE, NC 28110	Proration	0083740629	LHZ3062	AUTHORIZED	856601228	Refund Generated due to proration on Bill #0083740629-2024-2024-0000-00	Vehicle Sold	4/1/2026	4/2/2026	001	TAX	($1.72)	$0.00	($1.72)
															200	TAX	($5.29)	$0.00	($5.29)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.18)	$0.00	($0.18)
															005	TAX	($0.04)	$0.00	($0.04)
															004	TAX	($0.31)	$0.00	($0.31)
															002	TAX	($3.94)	$0.00	($3.94)
																		Refund	$11.48
GERMAN, JAMES LAWRENCE ALEKHIN	GERMAN, JAMES LAWRENCE ALEKHIN		6817 CREFT CIR		INDIAN TRAIL, NC 28079	Proration	0086684767	VHM5540	AUTHORIZED	859490261	Refund Generated due to proration on Bill #0086684767-2025-2025-0000-00	Vehicle Sold	4/15/2026	4/16/2026	001	TAX	($5.19)	$0.00	($5.19)
															900	TAX	($7.39)	$0.00	($7.39)
															023	TAX	($1.97)	$0.00	($1.97)
															003	TAX	($0.49)	$0.00	($0.49)
															005	TAX	($0.21)	$0.00	($0.21)
															004	TAX	($1.80)	$0.00	($1.80)
															002	TAX	($12.36)	$0.00	($12.36)
																		Refund	$29.41
GOVENOR, SHANE DAVID	GOVENOR, SHANE DAVID	GOVENOR, ATHENA PEARL	3430 PEBBLE DR		MONROE, NC 28110	Proration	0064276313	JMF1959	AUTHORIZED	858620154	Refund Generated due to proration on Bill #0064276313-2025-2025-0000-00	Vehicle Totalled	4/10/2026	4/16/2026	001	TAX	($14.67)	$0.00	($14.67)
															200	TAX	($57.42)	$0.00	($57.42)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.38)	$0.00	($1.38)
															005	TAX	($0.58)	$0.00	($0.58)
															004	TAX	($5.08)	$0.00	($5.08)
															002	TAX	($34.95)	$0.00	($34.95)
																		Refund	$114.08
GRAY, KENNETH AARON	GRAY, KENNETH AARON	EDENS, BAIGE NICOLE	1016 ESTATE LN		MATTHEWS, NC 28104	Proration	0085612518	VFC9770	AUTHORIZED	857108119	Refund Generated due to proration on Bill #0085612518-2024-2024-0000-00	Vehicle Sold	4/2/2026	4/6/2026	001	TAX	($14.64)	$0.00	($14.64)
															800	TAX	($2.24)	$0.00	($2.24)
															026	TAX	($3.57)	$0.00	($3.57)
															003	TAX	($1.57)	$0.00	($1.57)
															005	TAX	($0.35)	$0.00	($0.35)
															004	TAX	($2.62)	$0.00	($2.62)
															002	TAX	($33.57)	$0.00	($33.57)
																		Refund	$58.56
GRIFFIN, CHASE EDWARD	GRIFFIN, CHASE EDWARD		1219 ANNISTON PL		INDIAN TRAIL, NC 28079	Proration	0088720128	TMW9991	AUTHORIZED	738134484	Refund Generated due to proration on Bill #0088720128-2025-2025-0000-00	Vehicle Totalled	4/23/2026	4/24/2026	001	TAX	($79.69)	$0.00	($79.69)
															026	TAX	($21.55)	$0.00	($21.55)
															003	TAX	($7.52)	$0.00	($7.52)
															005	TAX	($3.19)	$0.00	($3.19)
															004	TAX	($27.58)	$0.00	($27.58)
															002	TAX	($189.87)	$0.00	($189.87)
																		Refund	$329.40
GRIFFITH, GREGORY SCOTT	GRIFFITH, GREGORY SCOTT		4410 ZEE CT		MONROE, NC 28110	Proration	0074940251	JAH9609	AUTHORIZED	735747474	Refund Generated due to proration on Bill #0074940251-2025-2025-0000-00	Vehicle Sold	4/9/2026	4/10/2026	001	TAX	($22.74)	$0.00	($22.74)
															023	TAX	($8.64)	$0.00	($8.64)
															003	TAX	($2.14)	$0.00	($2.14)
															005	TAX	($0.91)	$0.00	($0.91)
															004	TAX	($7.87)	$0.00	($7.87)
															002	TAX	($54.18)	$0.00	($54.18)
																		Refund	$96.48

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
HAN, QIAN	HAN, QIAN		4054 HENSHAW RD		WAXHAW, NC 28173	Proration	0081693254	LEJ7874	AUTHORIZED	983602736	Refund Generated due to proration on Bill #0081693254-2025-2025-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($20.26)	$0.00	($20.26)
															500	TAX	($52.28)	$0.00	($52.28)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($8.29)	$0.00	($8.29)
															003	TAX	($1.91)	$0.00	($1.91)
															005	TAX	($0.81)	$0.00	($0.81)
															004	TAX	($7.01)	$0.00	($7.01)
															002	TAX	($48.27)	$0.00	($48.27)
																		Refund	$138.83
HASBINI, DAVID KHALED	HASBINI, DAVID KHALED		7006 DACIAN LN		INDIAN TRAIL, NC 28079	Proration	0081255348	LAX2622	AUTHORIZED	861405545	Refund Generated due to proration on Bill #0081255348-2025-2025-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($16.77)	$0.00	($16.77)
															600	TAX	($25.35)	$0.00	($25.35)
															023	TAX	($6.37)	$0.00	($6.37)
															003	TAX	($1.58)	$0.00	($1.58)
															005	TAX	($0.67)	$0.00	($0.67)
															004	TAX	($5.80)	$0.00	($5.80)
															002	TAX	($39.94)	$0.00	($39.94)
																		Refund	$96.48
HELTON, MARK CHARLES	HELTON, MARK CHARLES	HELTON, SARAH CATHERINE	813 TRAVERS CT		MONROE, NC 28110	Proration	0072999403	TLV5424	AUTHORIZED	859225220	Refund Generated due to proration on Bill #0072999403-2024-2024-0000-00	Tag Surrender	4/14/2026	4/15/2026	001	TAX	($3.59)	$0.00	($3.59)
															970	TAX	($0.36)	$0.00	($0.36)
															026	TAX	($0.87)	$0.00	($0.87)
															003	TAX	($0.38)	$0.00	($0.38)
															005	TAX	($0.08)	$0.00	($0.08)
															004	TAX	($0.64)	$0.00	($0.64)
															002	TAX	($8.23)	$0.00	($8.23)
																		Refund	$14.15
HILL, LYDIA MARIE	HILL, LYDIA MARIE		PO BOX 1013		LOCUST, NC 28097	Proration	0078554673	TX5488	AUTHORIZED	615744925	Refund Generated due to proration on Bill #0078554673-2024-2024-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($3.15)	$0.00	($3.15)
															003	TAX	($0.34)	$0.00	($0.34)
															005	TAX	($0.07)	$0.00	($0.07)
															004	TAX	($0.56)	$0.00	($0.56)
															002	TAX	($7.22)	$0.00	($7.22)
																		Refund	$11.34
HOLMES, MARTIN JOSEPH	HOLMES, MARTIN JOSEPH	HOLMES, MARY BETH	245 SWEET BRIAR DR		INDIAN LAND, SC 29707	Proration	0079056036	JFA1468	AUTHORIZED	980997344	Refund Generated due to proration on Bill #0079056036-2025-2025-0000-00	Reg . Out of state	4/9/2026	4/10/2026	001	TAX	($21.47)	$0.00	($21.47)
															500	TAX	($55.39)	$0.00	($55.39)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($8.78)	$0.00	($8.78)
															003	TAX	($2.02)	$0.00	($2.02)
															005	TAX	($0.86)	$0.00	($0.86)
															004	TAX	($7.43)	$0.00	($7.43)
															002	TAX	($51.15)	$0.00	($51.15)
																		Refund	$147.10
HOLMES, MARY BETH	HOLMES, MARY BETH	HOLMES, MARTIN JOSEPH	245 SWEET BRIAR DR		INDIAN LAND, SC 29707	Proration	0086194074	JFA1469	AUTHORIZED	980997368	Refund Generated due to proration on Bill #0086194074-2025-2025-0000-00	Reg . Out of state	4/9/2026	4/10/2026	001	TAX	($31.08)	$0.00	($31.08)
															500	TAX	($80.20)	$0.00	($80.20)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($12.72)	$0.00	($12.72)
															003	TAX	($2.93)	$0.00	($2.93)
															005	TAX	($1.24)	$0.00	($1.24)
															004	TAX	($10.76)	$0.00	($10.76)
															002	TAX	($74.06)	$0.00	($74.06)
																		Refund	$212.99
HORVATH, BRAD STUART	HORVATH, BRAD STUART		5725 LINDLEY CRESCENT DR		INDIAN TRAIL, NC 28079	Proration	0075321904	TMW9282	AUTHORIZED	859188057	Refund Generated due to proration on Bill #0075321904-2025-2025-0000-00	Vehicle Sold	4/13/2026	4/14/2026	001	TAX	($34.17)	$0.00	($34.17)
															970	TAX	($6.84)	$0.00	($6.84)
															026	TAX	($9.24)	$0.00	($9.24)
															003	TAX	($3.22)	$0.00	($3.22)
															005	TAX	($1.37)	$0.00	($1.37)
															004	TAX	($11.83)	$0.00	($11.83)
															002	TAX	($81.41)	$0.00	($81.41)
																		Refund	$148.08
IANNETTO, JOSEPH CARMINE	IANNETTO, JOSEPH CARMINE	IANNETTO, SHARON MARIE	5725 LINDLEY CRESCENT DR		INDIAN TRAIL, NC 28079	Proration	0079411137	KCR7811	AUTHORIZED	737700870	Refund Generated due to proration on Bill #0079411137-2025-2025-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($15.59)	$0.00	($15.59)
															026	TAX	($4.22)	$0.00	($4.22)
															003	TAX	($1.47)	$0.00	($1.47)
															005	TAX	($0.62)	$0.00	($0.62)
															004	TAX	($5.40)	$0.00	($5.40)
															002	TAX	($37.13)	$0.00	($37.13)
																		Refund	$64.43
JOHN MATTHEWS INC	JOHN MATTHEWS INC		1204 GRAYSCROFT DR		WAXHAW, NC 28173	Proration	0088780366	MAL6368	AUTHORIZED	736446876	Refund Generated due to proration on Bill #0088780366-2025-2025-0000-00	Vehicle Sold	4/13/2026	4/14/2026	001	TAX	($17.53)	$0.00	($17.53)
															026	TAX	($4.74)	$0.00	($4.74)
															003	TAX	($1.65)	$0.00	($1.65)
															005	TAX	($0.70)	$0.00	($0.70)
															004	TAX	($6.07)	$0.00	($6.07)
															002	TAX	($41.78)	$0.00	($41.78)
																		Refund	$72.47

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
JOHNSON, CLYDE ZOBON	JOHNSON, CLYDE ZOBON		6716 3RD AVE		INDIAN TRAIL, NC 28079	Proration	0080658231	REB9954	AUTHORIZED	857814657	Refund Generated due to proration on Bill #0080658231-2025-2025-0000-00	Vehicle Sold	4/6/2026	4/7/2026	001	TAX	($11.99)	$0.00	($11.99)
															600	TAX	($18.14)	$0.00	($18.14)
															023	TAX	($4.56)	$0.00	($4.56)
															003	TAX	($1.13)	$0.00	($1.13)
															005	TAX	($0.48)	$0.00	($0.48)
															004	TAX	($4.15)	$0.00	($4.15)
															002	TAX	($28.57)	$0.00	($28.57)
																		Refund	$69.02
JOHNSTON, LOGAN TRUAX IV	JOHNSTON, LOGAN TRUAX IV		304 CORBIN CT		WAXHAW, NC 28173	Proration	0087463942	RJN8256	AUTHORIZED	979551048	Refund Generated due to proration on Bill #0087463942-2025-2025-0000-00	Vehicle Sold	4/2/2026	4/6/2026	001	TAX	($13.66)	$0.00	($13.66)
															101	TAX	($6.85)	$0.00	($6.85)
															101	VEHICLE FEE	$0.00	$0.00	$0.00
															026	TAX	($3.70)	$0.00	($3.70)
															003	TAX	($1.29)	$0.00	($1.29)
															005	TAX	($0.55)	$0.00	($0.55)
															004	TAX	($4.73)	$0.00	($4.73)
															002	TAX	($32.56)	$0.00	($32.56)
																		Refund	$63.34
KAL GROUP LLC	KAL GROUP LLC		5818 W HIGHWAY 74		INDIAN TRAIL, NC 28079	Proration	0085464493	VFZ1926	AUTHORIZED	858373390	Refund Generated due to proration on Bill #0085464493-2024-2024-0000-00	Vehicle Sold	4/9/2026	4/10/2026	001	TAX	($5.40)	$0.00	($5.40)
															600	TAX	($6.13)	$0.00	($6.13)
															023	TAX	($1.70)	$0.00	($1.70)
															003	TAX	($0.58)	$0.00	($0.58)
															005	TAX	($0.13)	$0.00	($0.13)
															004	TAX	($0.97)	$0.00	($0.97)
															002	TAX	($12.40)	$0.00	($12.40)
																		Refund	$27.31
KAL GROUP LLC	KAL GROUP LLC		5818 W HIGHWAY 74		INDIAN TRAIL, NC 28079	Proration	0086601848	VFZ2685	AUTHORIZED	858373432	Refund Generated due to proration on Bill #0086601848-2025-2025-0000-00	Vehicle Sold	4/9/2026	4/10/2026	001	TAX	($4.22)	$0.00	($4.22)
															600	TAX	($6.39)	$0.00	($6.39)
															023	TAX	($1.60)	$0.00	($1.60)
															003	TAX	($0.40)	$0.00	($0.40)
															005	TAX	($0.17)	$0.00	($0.17)
															004	TAX	($1.46)	$0.00	($1.46)
															002	TAX	($10.07)	$0.00	($10.07)
																		Refund	$24.31
KAL GROUP LLC	KAL GROUP LLC		5818 W HIGHWAY 74		INDIAN TRAIL, NC 28079	Proration	0086915881	KG11	AUTHORIZED	858373439	Refund Generated due to proration on Bill #0086915881-2025-2025-0000-00	Vehicle Sold	4/9/2026	4/10/2026	001	TAX	($4.11)	$0.00	($4.11)
															600	TAX	($6.21)	$0.00	($6.21)
															023	TAX	($1.56)	$0.00	($1.56)
															003	TAX	($0.38)	$0.00	($0.38)
															005	TAX	($0.16)	$0.00	($0.16)
															004	TAX	($1.42)	$0.00	($1.42)
															002	TAX	($9.79)	$0.00	($9.79)
																		Refund	$23.63
KAL GROUP LLC	KAL GROUP LLC		5818 W HIGHWAY 74		INDIAN TRAIL, NC 28079	Proration	0085730493	VFZ2223	AUTHORIZED	858373460	Refund Generated due to proration on Bill #0085730493-2024-2024-0000-00	Vehicle Sold	4/9/2026	4/10/2026	001	TAX	($6.88)	$0.00	($6.88)
															600	TAX	($7.80)	$0.00	($7.80)
															023	TAX	($2.16)	$0.00	($2.16)
															003	TAX	($0.74)	$0.00	($0.74)
															005	TAX	($0.16)	$0.00	($0.16)
															004	TAX	($1.23)	$0.00	($1.23)
															002	TAX	($15.78)	$0.00	($15.78)
																		Refund	$34.75
KENNEDY, RICHARD LEE	KENNEDY, RICHARD LEE		137 VILLABROOK WAY		BALTIMORE, MD 21212	Proration	0071200948	CAR2215	AUTHORIZED	738937686	Refund Generated due to proration on Bill #0071200948-2024-2024-0000-00	Vehicle Sold	4/28/2026	4/29/2026	001	TAX	($14.24)	$0.00	($14.24)
															014	TAX	($4.43)	$0.00	($4.43)
															003	TAX	($1.53)	$0.00	($1.53)
															005	TAX	($0.34)	$0.00	($0.34)
															004	TAX	($2.55)	$0.00	($2.55)
															002	TAX	($32.66)	$0.00	($32.66)
																		Refund	$55.75
KNIGHT, ERIN MOSELEY	KNIGHT, ERIN MOSELEY		1338 HARKEY CREEK DR		MONROE, NC 28110	Proration	0068609739	DMN4154	AUTHORIZED	735268350	Refund Generated due to proration on Bill #0068609739-2025-2025-0000-00	Vehicle Totalled	4/6/2026	4/7/2026	001	TAX	($15.41)	$0.00	($15.41)
															019	TAX	($6.80)	$0.00	($6.80)
															003	TAX	($1.45)	$0.00	($1.45)
															005	TAX	($0.62)	$0.00	($0.62)
															004	TAX	($5.33)	$0.00	($5.33)
															002	TAX	($36.71)	$0.00	($36.71)
																		Refund	$66.32
KORRAPATI, RAJENDRA PRASAD	KORRAPATI, RAJENDRA PRASAD		140 ELLISON WAY		MARVIN, NC 28173	Proration	0087626363	WAA4967	AUTHORIZED	985248896	Refund Generated due to proration on Bill #0087626363-2025-2025-0000-00	Vehicle Sold	4/28/2026	4/29/2026	001	TAX	($5.81)	$0.00	($5.81)
															101	TAX	($2.91)	$0.00	($2.91)
															101	VEHICLE FEE	$0.00	$0.00	$0.00
															026	TAX	($1.57)	$0.00	($1.57)
															003	TAX	($0.55)	$0.00	($0.55)
															005	TAX	($0.23)	$0.00	($0.23)
															004	TAX	($2.01)	$0.00	($2.01)
															002	TAX	($13.86)	$0.00	($13.86)
																		Refund	$26.94

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
LAMB, TRACI MARIE	LAMB, TRACI MARIE		1632 GREAT RD		WAXHAW, NC 28173	Proration	0073278370	HEF9483	AUTHORIZED	978972768	Refund Generated due to proration on Bill #0073278370-2025-2025-0000-00	Vehicle Totalled	4/1/2026	4/2/2026	001	TAX	($7.48)	$0.00	($7.48)
															500	TAX	($19.30)	$0.00	($19.30)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($3.06)	$0.00	($3.06)
															003	TAX	($0.71)	$0.00	($0.71)
															005	TAX	($0.30)	$0.00	($0.30)
															004	TAX	($2.59)	$0.00	($2.59)
															002	TAX	($17.83)	$0.00	($17.83)
																		Refund	$51.27
LARRISON, ROBERT GEORGE JR	LARRISON, ROBERT GEORGE JR	LARRISON, KATRINA HARRIS	1008 BIGGERS FARM CT		INDIAN TRAIL, NC 28079	Proration	0068241584	EFN4179	AUTHORIZED	860607314	Refund Generated due to proration on Bill #0068241584-2025-2025-0000-00	Vehicle Totalled	4/20/2026	4/21/2026	001	TAX	($11.09)	$0.00	($11.09)
															930	TAX	($1.97)	$0.00	($1.97)
															016	TAX	($5.57)	$0.00	($5.57)
															003	TAX	($1.05)	$0.00	($1.05)
															005	TAX	($0.45)	$0.00	($0.45)
															004	TAX	($3.84)	$0.00	($3.84)
															002	TAX	($26.42)	$0.00	($26.42)
																		Refund	$50.39
LEE, JAMES ALLEN	LEE, JAMES ALLEN		900 CLUB DR		MONROE, NC 28112	Proration	0060460812	HFF4058	AUTHORIZED	861406700	Refund Generated due to proration on Bill #0060460812-2024-2024-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($17.82)	$0.00	($17.82)
															200	TAX	($54.88)	$0.00	($54.88)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.91)	$0.00	($1.91)
															005	TAX	($0.42)	$0.00	($0.42)
															004	TAX	($3.19)	$0.00	($3.19)
															002	TAX	($40.87)	$0.00	($40.87)
																		Refund	$119.09
LEIBOWITZ, BRIAN ERIC	LEIBOWITZ, BRIAN ERIC		2012 WHIPCORD DR		WAXHAW, NC 28173	Proration	0085311838	LDV4292	AUTHORIZED	980721792	Refund Generated due to proration on Bill #0085311838-2024-2024-0000-00	Vehicle Sold	4/8/2026	4/9/2026	001	TAX	($24.09)	$0.00	($24.09)
															500	TAX	($56.82)	$0.00	($56.82)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($7.72)	$0.00	($7.72)
															003	TAX	($2.58)	$0.00	($2.58)
															005	TAX	($0.57)	$0.00	($0.57)
															004	TAX	($4.31)	$0.00	($4.31)
															002	TAX	($55.22)	$0.00	($55.22)
																		Refund	$151.31
LEITGEB, JACI LYNN	LEITGEB, JACI LYNN		525 CHASE PRAIRIE LN		WAXHAW, NC 28173	Proration	0087229839	KLD1728	AUTHORIZED	737142780	Refund Generated due to proration on Bill #0087229839-2024-2024-0000-00	Vehicle Sold	4/17/2026	4/21/2026	001	TAX	($52.17)	$0.00	($52.17)
															026	TAX	($12.72)	$0.00	($12.72)
															003	TAX	($5.60)	$0.00	($5.60)
															005	TAX	($1.25)	$0.00	($1.25)
															004	TAX	($9.33)	$0.00	($9.33)
															002	TAX	($119.62)	$0.00	($119.62)
																		Refund	$200.69
LENER, WAYNE IRVING	LENER, WAYNE IRVING		3002 TIMBER MILL DR		STALLINGS, NC 28104	Proration	0087484077	RBH3725	AUTHORIZED	985193896	Refund Generated due to proration on Bill #0087484077-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($2.59)	$0.00	($2.59)
															700	TAX	($4.35)	$0.00	($4.35)
															700	VEHICLE FEE	$0.00	$0.00	$0.00
															020	TAX	($1.06)	$0.00	($1.06)
															003	TAX	($0.25)	$0.00	($0.25)
															005	TAX	($0.10)	$0.00	($0.10)
															004	TAX	($0.89)	$0.00	($0.89)
															002	TAX	($6.16)	$0.00	($6.16)
																		Refund	$15.40
LEVENSON, LEAH SHARON	LEVENSON, LEAH SHARON	LEVENSON, SAWYER MATHEU	3337 TAYLOR MORRISON WAY		MONROE, NC 28110	Proration	0086136701	LBM4666	AUTHORIZED	856600920	Refund Generated due to proration on Bill #0086136701-2024-2024-0000-00	Vehicle Totalled	4/1/2026	4/2/2026	001	TAX	($14.55)	$0.00	($14.55)
															200	TAX	($44.79)	$0.00	($44.79)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.56)	$0.00	($1.56)
															005	TAX	($0.35)	$0.00	($0.35)
															004	TAX	($2.60)	$0.00	($2.60)
															002	TAX	($33.35)	$0.00	($33.35)
																		Refund	$97.20
LEWIS, ASHLEY SARA	LEWIS, ASHLEY SARA		1025 FORBISHIRE DR		MATTHEWS, NC 28104	Proration	0074577656	RBP2531	AUTHORIZED	861155407	Refund Generated due to proration on Bill #0074577656-2025-2025-0000-00	Vehicle Sold	4/23/2026	4/24/2026	001	TAX	($144.87)	$0.00	($144.87)
															600	TAX	($219.10)	$0.00	($219.10)
															020	TAX	($59.54)	$0.00	($59.54)
															003	TAX	($13.66)	$0.00	($13.66)
															005	TAX	($5.80)	$0.00	($5.80)
															004	TAX	($50.13)	$0.00	($50.13)
															002	TAX	($345.15)	$0.00	($345.15)
																		Refund	$838.25
LIMESTONE PRODUCTS INC	LIMESTONE PRODUCTS INC		PO BOX 1309		MONROE, NC 28111	Proration	0081798152	VJ5845	AUTHORIZED	856601186	Refund Generated due to proration on Bill #0081798152-2025-2025-0000-00	Vehicle Sold	4/1/2026	4/2/2026	001	TAX	($1.36)	$0.00	($1.36)
															200	TAX	($5.32)	$0.00	($5.32)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.12)	$0.00	($0.12)
															005	TAX	($0.06)	$0.00	($0.06)
															004	TAX	($0.47)	$0.00	($0.47)
															002	TAX	($3.23)	$0.00	($3.23)
																		Refund	$10.56

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
LIMESTONE PRODUCTS INC	LIMESTONE PRODUCTS INC		PO BOX 1309		MONROE, NC 28111	Proration	0088603896	LMB8828	AUTHORIZED	856601242	Refund Generated due to proration on Bill #0088603896-2025-2025-0000-00	Vehicle Sold	4/1/2026	4/2/2026	001	TAX	($86.26)	$0.00	($86.26)
															200	TAX	($337.65)	$0.00	($337.65)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($8.14)	$0.00	($8.14)
															005	TAX	($3.45)	$0.00	($3.45)
															004	TAX	($29.85)	$0.00	($29.85)
															002	TAX	($205.51)	$0.00	($205.51)
																		Refund	$670.86
LIMESTONE PRODUCTS INC	LIMESTONE PRODUCTS INC		PO BOX 1309		MONROE, NC 28111	Proration	0067440564	JFK3341	AUTHORIZED	859490443	Refund Generated due to proration on Bill #0067440564-2025-2025-0000-00	Vehicle Sold	4/15/2026	4/16/2026	001	TAX	($12.71)	$0.00	($12.71)
															200	TAX	($49.76)	$0.00	($49.76)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.20)	$0.00	($1.20)
															005	TAX	($0.51)	$0.00	($0.51)
															004	TAX	($4.40)	$0.00	($4.40)
															002	TAX	($30.29)	$0.00	($30.29)
																		Refund	$98.87
LIMESTONE PRODUCTS INC.	LIMESTONE PRODUCTS INC.		PO BOX 1309		MONROE, NC 28111	Proration	0089951131	MAM9392	AUTHORIZED	859999343	Refund Generated due to proration on Bill #0089951131-2025-2025-0000-00	Vehicle Sold	4/17/2026	4/21/2026	001	TAX	($91.30)	$0.00	($91.30)
															200	TAX	($357.39)	$0.00	($357.39)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($8.61)	$0.00	($8.61)
															005	TAX	($3.66)	$0.00	($3.66)
															004	TAX	($31.60)	$0.00	($31.60)
															002	TAX	($217.52)	$0.00	($217.52)
																		Refund	$710.08
LOERA, YANIRIS ZABALA	LOERA, YANIRIS ZABALA	LOERA, AARON MAURICIO	4102 TWENTY GRAND DR		INDIAN TRAIL, NC 28079	Proration	0064158268	RDM2455	AUTHORIZED	861155351	Refund Generated due to proration on Bill #0064158268-2025-2025-0000-00	Vehicle Sold	4/23/2026	4/24/2026	001	TAX	($22.27)	$0.00	($22.27)
															600	TAX	($33.69)	$0.00	($33.69)
															023	TAX	($8.46)	$0.00	($8.46)
															003	TAX	($2.10)	$0.00	($2.10)
															005	TAX	($0.89)	$0.00	($0.89)
															004	TAX	($7.71)	$0.00	($7.71)
															002	TAX	($53.07)	$0.00	($53.07)
																		Refund	$128.19
MAGAT, JONATHAN RICO	MAGAT, JONATHAN RICO		2866 OLDFIELD DR		MONROE, NC 28110	Proration	0088254995	LMH5634	AUTHORIZED	857813320	Refund Generated due to proration on Bill #0088254995-2025-2025-0000-00	Vehicle Sold	4/6/2026	4/7/2026	001	TAX	($2.75)	$0.00	($2.75)
															200	TAX	($10.77)	$0.00	($10.77)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.26)	$0.00	($0.26)
															005	TAX	($0.11)	$0.00	($0.11)
															004	TAX	($0.95)	$0.00	($0.95)
															002	TAX	($6.55)	$0.00	($6.55)
																		Refund	$21.39
MALAPATI, SRINIVASA CHOWDARI	MALAPATI, SRINIVASA CHOWDARI		212 CORONADO AVE		MATTHEWS, NC 28104	Adjustment < $100	0090323047	RLC8103	PENDING	857107321	Refund Generated due to adjustment on Bill #0090323047-2025-2025-0000-00	Over Assessment	4/2/2026		001	TAX	($9.45)	$0.00	($9.45)
															600	TAX	($14.30)	$0.00	($14.30)
															020	TAX	($3.89)	$0.00	($3.89)
															003	TAX	($0.90)	$0.00	($0.90)
															005	TAX	($0.38)	$0.00	($0.38)
															004	TAX	($3.28)	$0.00	($3.28)
															002	TAX	($22.52)	$0.00	($22.52)
																		Refund	$54.72
MALAPATI, SRINIVASA CHOWDARI	MALAPATI, SRINIVASA CHOWDARI		212 CORONADO AVE		MATTHEWS, NC 28104	Adjustment < $100	0090323203	MBD5109	PENDING	857108203	Refund Generated due to adjustment on Bill #0090323203-2025-2025-0000-00	Damage	4/2/2026		001	TAX	($3.14)	$0.00	($3.14)
															600	TAX	($4.75)	$0.00	($4.75)
															020	TAX	($1.29)	$0.00	($1.29)
															003	TAX	($0.29)	$0.00	($0.29)
															005	TAX	($0.12)	$0.00	($0.12)
															004	TAX	($1.09)	$0.00	($1.09)
															002	TAX	($7.48)	$0.00	($7.48)
																		Refund	$18.16
MALLIOS, BRENDA MARIE	MALLIOS, BRENDA MARIE		290 BIRCH DR		RICHMOND HILL, GA 31324	Proration	0088806155	RLK3739	AUTHORIZED	736706514	Refund Generated due to proration on Bill #0088806155-2025-2025-0000-00	Reg . Out of state	4/15/2026	4/16/2026	001	TAX	($28.27)	$0.00	($28.27)
															026	TAX	($7.64)	$0.00	($7.64)
															003	TAX	($2.66)	$0.00	($2.66)
															005	TAX	($1.13)	$0.00	($1.13)
															004	TAX	($9.78)	$0.00	($9.78)
															002	TAX	($67.34)	$0.00	($67.34)
																		Refund	$116.82
MCGOWAN, JOHN DAVID	MCGOWAN, JOHN DAVID		3207 DELAMERE DR		MATTHEWS, NC 28104	Proration	0039963295	FCD1909	AUTHORIZED	857108049	Refund Generated due to proration on Bill #0039963295-2025-2025-0000-00	Vehicle Sold	4/2/2026	4/6/2026	001	TAX	($8.83)	$0.00	($8.83)
															600	TAX	($13.35)	$0.00	($13.35)
															020	TAX	($3.63)	$0.00	($3.63)
															003	TAX	($0.83)	$0.00	($0.83)
															005	TAX	($0.36)	$0.00	($0.36)
															004	TAX	($3.06)	$0.00	($3.06)
															002	TAX	($21.03)	$0.00	($21.03)
																		Refund	$51.09

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
MCINNIS CONSTRUCTION CO	MCINNIS CONSTRUCTION CO		PO BOX 422		INDIAN TRAIL, NC 28079	Adjustment < $100	0089885225	JZ3365	PENDING	1226246520	Refund Generated due to adjustment on Bill #0089885225-2025-2025-0000	Situs error	4/9/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($30.40)	$0.00	($30.40)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															700	TAX	$13.06	$0.00	$13.06
															700	VEHICLE FEE	$25.00	$0.00	$25.00
															020	TAX	$3.19	$0.00	$3.19
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$19.15
MEDLIN, SHAUN ONEL	MEDLIN, SHAUN ONEL	MEDLIN, BRITTANY LAMBERT	5826 WALLACE BRANCH RD		MARSHVILLE, NC 28103	Proration	0047267000	BMH4366	AUTHORIZED	735295872	Refund Generated due to proration on Bill #0047267000-2024-2024-0000-00	Vehicle Totalled	4/7/2026	4/8/2026	001	TAX	($9.52)	$0.00	($9.52)
															027	TAX	($3.84)	$0.00	($3.84)
															003	TAX	($1.02)	$0.00	($1.02)
															005	TAX	($0.23)	$0.00	($0.23)
															004	TAX	($1.70)	$0.00	($1.70)
															002	TAX	($21.83)	$0.00	($21.83)
																		Refund	$38.14
MODAK, MICHAEL DAVID	MODAK, MICHAEL DAVID	MODAK, MARILYN SUE	303 BELLE MEADE CT		WAXHAW, NC 28173	Proration	0048426565	HAV4001	AUTHORIZED	734664066	Refund Generated due to proration on Bill #0048426565-2024-2024-0000-00	Vehicle Sold	4/2/2026	4/6/2026	001	TAX	($10.22)	$0.00	($10.22)
															026	TAX	($2.49)	$0.00	($2.49)
															003	TAX	($1.09)	$0.00	($1.09)
															005	TAX	($0.24)	$0.00	($0.24)
															004	TAX	($1.83)	$0.00	($1.83)
															002	TAX	($23.42)	$0.00	($23.42)
																		Refund	$39.29
MOREE, EDDIE E	MOREE, EDDIE E	MOREES TRANSPORT	3023 HAYWOOD RD		MONROE, NC 28110	Proration	0083129773	ZK5508	AUTHORIZED	737905986	Refund Generated due to proration on Bill #0083129773-2025-2025-0000-01	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($65.01)	$0.00	($65.01)
															019	TAX	($28.69)	$0.00	($28.69)
															003	TAX	($6.13)	$0.00	($6.13)
															005	TAX	($2.60)	$0.00	($2.60)
															004	TAX	($22.50)	$0.00	($22.50)
															002	TAX	($154.90)	$0.00	($154.90)
																		Refund	$279.83
MORRISON, GABRIELLA IMAN	MORRISON, GABRIELLA IMAN		9011 DEER VALLEY CT		WAXHAW, NC 28173	Proration	0087507340	LEN2942	AUTHORIZED	736910256	Refund Generated due to proration on Bill #0087507340-2025-2025-0000-00	Vehicle Sold	4/16/2026	4/17/2026	001	TAX	($56.58)	$0.00	($56.58)
															026	TAX	($15.30)	$0.00	($15.30)
															003	TAX	($5.33)	$0.00	($5.33)
															005	TAX	($2.26)	$0.00	($2.26)
															004	TAX	($19.58)	$0.00	($19.58)
															002	TAX	($134.80)	$0.00	($134.80)
																		Refund	$233.85
MORRISON, SHAWN	MORRISON, SHAWN		9011 DEER VALLEY CT		WAXHAW, NC 28173	Proration	0077575551	LAZ8582	AUTHORIZED	738347592	Refund Generated due to proration on Bill #0077575551-2025-2025-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($69.37)	$0.00	($69.37)
															026	TAX	($18.76)	$0.00	($18.76)
															003	TAX	($6.54)	$0.00	($6.54)
															005	TAX	($2.78)	$0.00	($2.78)
															004	TAX	($24.01)	$0.00	($24.01)
															002	TAX	($165.29)	$0.00	($165.29)
																		Refund	$286.75
MYRICK, CARRIE LYNNE	MYRICK, CARRIE LYNNE	MYRICK, JAMES CHRISTOPHER	309 RANELAGH DR		WAXHAW, NC 28173	Proration	0080657808	KFZ9693	AUTHORIZED	735296010	Refund Generated due to proration on Bill #0080657808-2025-2025-0000-00	Vehicle Sold	4/7/2026	4/8/2026	001	TAX	($29.15)	$0.00	($29.15)
															026	TAX	($7.89)	$0.00	($7.89)
															003	TAX	($2.75)	$0.00	($2.75)
															005	TAX	($1.17)	$0.00	($1.17)
															004	TAX	($10.09)	$0.00	($10.09)
															002	TAX	($69.45)	$0.00	($69.45)
																		Refund	$120.50
MYRICK, JAMES CHRISTOPHER	MYRICK, JAMES CHRISTOPHER		309 RANELAGH DR		WAXHAW, NC 28173	Proration	0084666184	JHA6853	AUTHORIZED	735296022	Refund Generated due to proration on Bill #0084666184-2024-2024-0000-00	Vehicle Sold	4/7/2026	4/8/2026	001	TAX	($9.20)	$0.00	($9.20)
															026	TAX	($2.24)	$0.00	($2.24)
															003	TAX	($0.99)	$0.00	($0.99)
															005	TAX	($0.22)	$0.00	($0.22)
															004	TAX	($1.64)	$0.00	($1.64)
															002	TAX	($21.09)	$0.00	($21.09)
																		Refund	$35.38
NAWAB, SRINIVAS GOUD	NAWAB, SRINIVAS GOUD		332 SOMERLED WAY		WAXHAW, NC 28173	Proration	0082731470	KJR1584	AUTHORIZED	981929176	Refund Generated due to proration on Bill #0082731470-2024-2024-0000-00	Vehicle Totalled	4/13/2026	4/14/2026	001	TAX	($11.42)	$0.00	($11.42)
															500	TAX	($26.94)	$0.00	($26.94)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($3.66)	$0.00	($3.66)
															003	TAX	($1.22)	$0.00	($1.22)
															005	TAX	($0.27)	$0.00	($0.27)
															004	TAX	($2.04)	$0.00	($2.04)
															002	TAX	($26.18)	$0.00	($26.18)
																		Refund	$71.73
NEEL, JEFFREY RICHARD	NEEL, JEFFREY RICHARD		113 CEDAR KNOLL CIR		PINEVILLE, NC 28134	Proration	0074197345	RDE2325	AUTHORIZED	983601792	Refund Generated due to proration on Bill #0074197345-2024-2024-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($6.49)	$0.00	($6.49)
															101	TAX	($3.18)	$0.00	($3.18)
															101	VEHICLE FEE	$0.00	$0.00	$0.00
															026	TAX	($1.58)	$0.00	($1.58)
															003	TAX	($0.70)	$0.00	($0.70)
															005	TAX	($0.16)	$0.00	($0.16)
															004	TAX	($1.16)	$0.00	($1.16)
															002	TAX	($14.87)	$0.00	($14.87)
																		Refund	$28.14

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
NIKONOWICZ, JESSE CHRISTOPHER JR	NIKONOWICZ, JESSE CHRISTOPHER JR		5113 KINDER OAK DR		INDIAN TRAIL, NC 28079	Proration	0068199836	RPS3191	AUTHORIZED	860607321	Refund Generated due to proration on Bill #0068199836-2025-2025-0000-00	Vehicle Totalled	4/20/2026	4/21/2026	001	TAX	($20.17)	$0.00	($20.17)
															600	TAX	($30.51)	$0.00	($30.51)
															023	TAX	($7.66)	$0.00	($7.66)
															003	TAX	($1.90)	$0.00	($1.90)
															005	TAX	($0.81)	$0.00	($0.81)
															004	TAX	($6.98)	$0.00	($6.98)
															002	TAX	($48.06)	$0.00	($48.06)
																		Refund	$116.09
ONE11 CONSTRUCTION LLC	ONE11 CONSTRUCTION LLC		124 UNIONVILLE INDIAN TRAIL RD	STE A-7	INDIAN TRAIL, NC 28079	Adjustment < $100	0089840392	MBK5175	PENDING	1103621895	Refund Generated due to adjustment on Bill #0089840392-2025-2025-0000	Situs error	4/9/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$23.38	$0.00	$23.38
															200	TAX	($60.50)	$0.00	($60.50)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															020	TAX	$6.35	$0.00	$6.35
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$60.77
OSHATYUK, TIMOTHY	OSHATYUK, TIMOTHY		1011 CRAVEN ST		INDIAN TRAIL, NC 28079	Adjustment < $100	0090306923	TIMASM	PENDING	858372151	Refund Generated due to adjustment on Bill #0090306923-2025-2025-0000-00	SLVG or RBLT TTL	4/9/2026		001	TAX	($10.85)	$0.00	($10.85)
															600	TAX	($16.40)	$0.00	($16.40)
															019	TAX	($4.79)	$0.00	($4.79)
															003	TAX	($1.02)	$0.00	($1.02)
															005	TAX	($0.43)	$0.00	($0.43)
															004	TAX	($3.75)	$0.00	($3.75)
															002	TAX	($25.83)	$0.00	($25.83)
																		Refund	$63.07
PALOMBELLA, MICHAEL DELANEY	PALOMBELLA, MICHAEL DELANEY		9601 ROYAL COLONY DR		WAXHAW, NC 28173	Proration	0075784142	JEL6944	AUTHORIZED	739219806	Refund Generated due to proration on Bill #0075784142-2025-2025-0000-00	Vehicle Sold	4/29/2026	5/1/2026	001	TAX	($32.40)	$0.00	($32.40)
															026	TAX	($8.76)	$0.00	($8.76)
															003	TAX	($3.06)	$0.00	($3.06)
															005	TAX	($1.30)	$0.00	($1.30)
															004	TAX	($11.21)	$0.00	($11.21)
															002	TAX	($77.21)	$0.00	($77.21)
																		Refund	$133.94
PATEL, DILIP B	PATEL, DILIP B	PATEL, BINITA DILIP	741 SANTOLINA CT		WAXHAW, NC 28173	Proration	0058984963	RAL1570	AUTHORIZED	862424731	Refund Generated due to proration on Bill #0058984963-2024-2024-0000-00	Vehicle Sold	4/29/2026	5/1/2026	001	TAX	($9.04)	$0.00	($9.04)
															800	TAX	($1.38)	$0.00	($1.38)
															026	TAX	($2.20)	$0.00	($2.20)
															003	TAX	($0.97)	$0.00	($0.97)
															005	TAX	($0.22)	$0.00	($0.22)
															004	TAX	($1.62)	$0.00	($1.62)
															002	TAX	($20.72)	$0.00	($20.72)
																		Refund	$36.15
PATERSON-JONES, EDWARD RICHARD	PATERSON-JONES, EDWARD RICHARD		7325 MOCKINGBIRD LN		WAXHAW, NC 28173	Proration	0066888648	HCS6270	AUTHORIZED	735269466	Refund Generated due to proration on Bill #0066888648-2024-2024-0000-00	Vehicle Sold	4/6/2026	4/7/2026	001	TAX	($12.46)	$0.00	($12.46)
															028	TAX	($3.99)	$0.00	($3.99)
															003	TAX	($1.33)	$0.00	($1.33)
															005	TAX	($0.30)	$0.00	($0.30)
															004	TAX	($2.23)	$0.00	($2.23)
															002	TAX	($28.57)	$0.00	($28.57)
																		Refund	$48.88
PEAK CLOUD LLC	PEAK CLOUD LLC		5046 OAKMERE RD		WAXHAW, NC 28173	Adjustment < $100	0088596076	VHY7111	PENDING	982546928	Refund Generated due to adjustment on Bill #0088596076-2025-2025-0000-00	Over Assessment	4/16/2026		001	TAX	($6.78)	$0.00	($6.78)
															500	TAX	($17.50)	$0.00	($17.50)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($2.77)	$0.00	($2.77)
															003	TAX	($0.64)	$0.00	($0.64)
															005	TAX	($0.28)	$0.00	($0.28)
															004	TAX	($2.35)	$0.00	($2.35)
															002	TAX	($16.16)	$0.00	($16.16)
																		Refund	$46.48
PERRY, JUSTYN PHILLIP	PERRY, JUSTYN PHILLIP		1215 LAGGAN LN		INDIAN TRAIL, NC 28079	Proration	0088272450	LMB8276	AUTHORIZED	862044918	Refund Generated due to proration on Bill #0088272450-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($17.16)	$0.00	($17.16)
															600	TAX	($25.95)	$0.00	($25.95)
															023	TAX	($6.52)	$0.00	($6.52)
															003	TAX	($1.62)	$0.00	($1.62)
															005	TAX	($0.69)	$0.00	($0.69)
															004	TAX	($5.94)	$0.00	($5.94)
															002	TAX	($40.88)	$0.00	($40.88)
																		Refund	$98.76
PHAM, TONY	PHAM, TONY	NGUYEN, LISA	6005 FINE ROBE DR		INDIAN TRAIL, NC 28079	Proration	0063519383	HMK9162	AUTHORIZED	859490905	Refund Generated due to proration on Bill #0063519383-2025-2025-0000-00	Vehicle Sold	4/15/2026	4/16/2026	001	TAX	($17.22)	$0.00	($17.22)
															600	TAX	($26.05)	$0.00	($26.05)
															023	TAX	($6.54)	$0.00	($6.54)
															003	TAX	($1.62)	$0.00	($1.62)
															005	TAX	($0.69)	$0.00	($0.69)
															004	TAX	($5.96)	$0.00	($5.96)
															002	TAX	($41.04)	$0.00	($41.04)
																		Refund	$99.12

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
PHILLIPS, JEFFREY WILLIAM	PHILLIPS, JEFFREY WILLIAM		6712 MANESS DR		INDIAN TRAIL, NC 28079	Proration	0076008514	VCL8917	AUTHORIZED	861156604	Refund Generated due to proration on Bill #0076008514-2025-2025-0000-00	Vehicle Sold	4/23/2026	4/24/2026	001	TAX	($29.14)	$0.00	($29.14)
															600	TAX	($44.08)	$0.00	($44.08)
															023	TAX	($11.07)	$0.00	($11.07)
															003	TAX	($2.74)	$0.00	($2.74)
															005	TAX	($1.17)	$0.00	($1.17)
															004	TAX	($10.09)	$0.00	($10.09)
															002	TAX	($69.43)	$0.00	($69.43)
																		Refund	$167.72
PICKARD, STACEY DENISE	PICKARD, STACEY DENISE		8512 OLD WAXHAW MONROE RD		WAXHAW, NC 28173	Proration	0081241465	KFC4498	AUTHORIZED	738937920	Refund Generated due to proration on Bill #0081241465-2025-2025-0000-00	Vehicle Sold	4/28/2026	4/29/2026	001	TAX	($30.52)	$0.00	($30.52)
															028	TAX	($12.49)	$0.00	($12.49)
															003	TAX	($2.88)	$0.00	($2.88)
															005	TAX	($1.22)	$0.00	($1.22)
															004	TAX	($10.56)	$0.00	($10.56)
															002	TAX	($72.71)	$0.00	($72.71)
																		Refund	$130.38
PIGG, ANNA BUFORD	PIGG, ANNA BUFORD		1215 STACK RD		MONROE, NC 28112	Proration	0087889879	KEW4445	AUTHORIZED	736911024	Refund Generated due to proration on Bill #0087889879-2025-2025-0000-00	Vehicle Sold	4/16/2026	4/17/2026	001	TAX	($41.75)	($2.08)	($43.83)
															014	TAX	($16.34)	($0.82)	($17.16)
															003	TAX	($3.93)	($0.20)	($4.13)
															005	TAX	($1.67)	($0.08)	($1.75)
															004	TAX	($14.45)	($0.73)	($15.18)
															002	TAX	($99.47)	($4.97)	($104.44)
																		Refund	$186.49
PIRELA, FREIDYS RAMON	PIRELA, FREIDYS RAMON		4000 ALICE FLAGG LN	APT # 104	INDIAN TRAIL, NC 28079	Proration	0090058077	VFH2561	AUTHORIZED	858132149	Refund Generated due to proration on Bill #0090058077-2025-2025-0000-00	Vehicle Sold	4/8/2026	4/9/2026	001	TAX	($6.74)	$0.00	($6.74)
															200	TAX	($26.38)	$0.00	($26.38)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.63)	$0.00	($0.63)
															005	TAX	($0.27)	$0.00	($0.27)
															004	TAX	($2.33)	$0.00	($2.33)
															002	TAX	($16.05)	$0.00	($16.05)
																		Refund	$52.40
PLUMLEY, THOMAS PAUL	PLUMLEY, THOMAS PAUL	PLUMLEY, MELISSA BOWMAN	1028 BALLYFIN WAY		MONROE, NC 28110	Proration	0083238665	RBM4852	AUTHORIZED	737906310	Refund Generated due to proration on Bill #0083238665-2025-2025-0000-00	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($19.75)	$0.00	($19.75)
															015	TAX	($8.33)	$0.00	($8.33)
															003	TAX	($1.86)	$0.00	($1.86)
															005	TAX	($0.79)	$0.00	($0.79)
															004	TAX	($6.83)	$0.00	($6.83)
															002	TAX	($47.05)	$0.00	($47.05)
																		Refund	$84.61
POLLARD GRANT, DELOIS JEAN	POLLARD GRANT, DELOIS JEAN		PO BOX 38508		CHARLOTTE, NC 28278	Proration	0084227125	RCF8189	AUTHORIZED	983874088	Refund Generated due to proration on Bill #0084227125-2024-2024-0000-00	Reg . Out of state	4/22/2026	4/23/2026	001	TAX	($14.49)	$0.00	($14.49)
															500	TAX	($34.19)	$0.00	($34.19)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($4.64)	$0.00	($4.64)
															003	TAX	($1.55)	$0.00	($1.55)
															005	TAX	($0.35)	$0.00	($0.35)
															004	TAX	($2.59)	$0.00	($2.59)
															002	TAX	($33.23)	$0.00	($33.23)
																		Refund	$91.04
RING, TIMMY LEE	RING, TIMMY LEE		2400 OLD CAMDEN RD		MONROE, NC 28110	Proration	0072515277	CL68972	AUTHORIZED	862094205	Refund Generated due to proration on Bill #0072515277-2024-2024-0000-00	Vehicle Sold	4/28/2026	4/29/2026	001	TAX	($16.23)	$0.00	($16.23)
															980	TAX	($1.99)	$0.00	($1.99)
															021	TAX	($6.73)	$0.00	($6.73)
															003	TAX	($1.74)	$0.00	($1.74)
															005	TAX	($0.39)	$0.00	($0.39)
															004	TAX	($2.90)	$0.00	($2.90)
															002	TAX	($37.20)	$0.00	($37.20)
																		Refund	$67.18
RITCHIE, BENJAMIN CALEB	RITCHIE, BENJAMIN CALEB		2713 FARICROFT LANE		MONROE, NC 28110	Adjustment < $100	0089976153	RLN4748	PENDING	1103312718	Refund Generated due to adjustment on Bill #0089976153-2025-2025-0000	Situs error	4/8/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$11.10	$0.00	$11.10
															200	TAX	($28.73)	$0.00	($28.73)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															019	TAX	$3.24	$0.00	$3.24
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$44.39
RODRIGUEZ PRODUCE INC	RODRIGUEZ PRODUCE INC		2421 NELDA DR		MONROE, NC 28110	Proration	0088300419	MAA8381	AUTHORIZED	859188015	Refund Generated due to proration on Bill #0088300419-2025-2025-0000-00	Vehicle Sold	4/13/2026	4/14/2026	001	TAX	($75.72)	$0.00	($75.72)
															200	TAX	($296.43)	$0.00	($296.43)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($7.14)	$0.00	($7.14)
															005	TAX	($3.03)	$0.00	($3.03)
															004	TAX	($26.21)	$0.00	($26.21)
															002	TAX	($180.42)	$0.00	($180.42)
																		Refund	$588.95

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
RODRIGUEZ PRODUCE INC	RODRIGUEZ PRODUCE INC		2421 NELDA DR		MONROE, NC 28110	Proration	0088221889	LKN5420	AUTHORIZED	859729591	Refund Generated due to proration on Bill #0088221889-2025-2025-0000-00	Vehicle Sold	4/16/2026	4/17/2026	001	TAX	($71.48)	$0.00	($71.48)
															200	TAX	($279.81)	$0.00	($279.81)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($6.74)	$0.00	($6.74)
															005	TAX	($2.86)	$0.00	($2.86)
															004	TAX	($24.74)	$0.00	($24.74)
															002	TAX	($170.30)	$0.00	($170.30)
																		Refund	$555.93
ROGERS, KENNETH STEVENS	ROGERS, KENNETH STEVENS		7431 MOCKINGBIRD LN		WAXHAW, NC 28173	Proration	0016591694	7W3134	AUTHORIZED	738348660	Refund Generated due to proration on Bill #0016591694-2025-2025-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($0.71)	$0.00	($0.71)
															028	TAX	($0.29)	$0.00	($0.29)
															003	TAX	($0.07)	$0.00	($0.07)
															005	TAX	($0.02)	$0.00	($0.02)
															004	TAX	($0.25)	$0.00	($0.25)
															002	TAX	($1.70)	$0.00	($1.70)
																		Refund	$3.04
ROY, ROBERT P	ROY, ROBERT P		3309 BLACK CHERRY DR		MONROE, NC 28110	Proration	0070925542	KDM8692	AUTHORIZED	859490338	Refund Generated due to proration on Bill #0070925542-2025-2025-0000-00	Vehicle Sold	4/15/2026	4/16/2026	001	TAX	($21.30)	$0.00	($21.30)
															200	TAX	($83.41)	$0.00	($83.41)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($2.01)	$0.00	($2.01)
															005	TAX	($0.85)	$0.00	($0.85)
															004	TAX	($7.37)	$0.00	($7.37)
															002	TAX	($50.76)	$0.00	($50.76)
																		Refund	$165.70
RUBY POOLE HARRIS REVOCABLE TRUST U/A APRIL 11, 2017	RUBY POOLE HARRIS REVOCABLE TRUST U/A APRIL 11, 2017	HARRIS, RUBY POOLE	1119 BRIEF RD W		INDIAN TRAIL, NC 28079	Proration	0062673141	ZYN2709	AUTHORIZED	857813117	Refund Generated due to proration on Bill #0062673141-2025-2025-0000-00	Vehicle Sold	4/6/2026	4/7/2026	001	TAX	($15.51)	$0.00	($15.51)
															930	TAX	($2.76)	$0.00	($2.76)
															016	TAX	($7.79)	$0.00	($7.79)
															003	TAX	($1.46)	$0.00	($1.46)
															005	TAX	($0.62)	$0.00	($0.62)
															004	TAX	($5.37)	$0.00	($5.37)
															002	TAX	($36.94)	$0.00	($36.94)
																		Refund	$70.45
RUBY POOLE HARRIS REVOCABLE TRUST U/A APRIL 11, 2017	RUBY POOLE HARRIS REVOCABLE TRUST U/A APRIL 11, 2017	HARRIS, RUBY POOLE	1119 BRIEF RD W		INDIAN TRAIL, NC 28079	Proration	0062269366	XNX9830	AUTHORIZED	857813131	Refund Generated due to proration on Bill #0062269366-2025-2025-0000-00	Vehicle Sold	4/6/2026	4/7/2026	001	TAX	($0.60)	$0.00	($0.60)
															930	TAX	($0.11)	$0.00	($0.11)
															016	TAX	($0.30)	$0.00	($0.30)
															003	TAX	($0.05)	$0.00	($0.05)
															005	TAX	($0.03)	$0.00	($0.03)
															004	TAX	($0.21)	$0.00	($0.21)
															002	TAX	($1.43)	$0.00	($1.43)
																		Refund	$2.73
RYC ROOFING CONSTRUCTION LLC	RYC ROOFING CONSTRUCTION LLC		3113 OLD PAGELAND RD		WINGATE, NC 28174	Adjustment < $100	0090004228	AA5595E	PENDING	980722376	Refund Generated due to adjustment on Bill #0090004228-2025-2025-0000	Situs error	4/8/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($37.40)	$0.00	($37.40)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															024	TAX	$5.49	$0.00	$5.49
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$61.91
SEALE, MALVIN MCLAURENT	SEALE, MALVIN MCLAURENT		4806 BEULAH CHURCH RD		WEDDINGTON, NC 28104	Proration	0066811310	TJR9242	AUTHORIZED	860651001	Refund Generated due to proration on Bill #0066811310-2024-2024-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($26.40)	$0.00	($26.40)
															800	TAX	($4.05)	$0.00	($4.05)
															026	TAX	($6.44)	$0.00	($6.44)
															003	TAX	($2.83)	$0.00	($2.83)
															005	TAX	($0.63)	$0.00	($0.63)
															004	TAX	($4.72)	$0.00	($4.72)
															002	TAX	($60.54)	$0.00	($60.54)
																		Refund	$105.61
SEIDEN, ERIC MICHAEL	SEIDEN, ERIC MICHAEL		10200 FINK RD		MT PLEASANT, NC 28124	Proration	0068633189	RAE1632	AUTHORIZED	985191936	Refund Generated due to proration on Bill #0068633189-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($28.10)	$0.00	($28.10)
															700	TAX	($47.26)	$0.00	($47.26)
															700	VEHICLE FEE	$0.00	$0.00	$0.00
															020	TAX	($11.55)	$0.00	($11.55)
															003	TAX	($2.65)	$0.00	($2.65)
															005	TAX	($1.12)	$0.00	($1.12)
															004	TAX	($9.73)	$0.00	($9.73)
															002	TAX	($66.96)	$0.00	($66.96)
																		Refund	$167.37
SELENT, ERIC RAYMOND	SELENT, ERIC RAYMOND		1601 ASHBURN RIDGE DR		WAXHAW, NC 28173	Proration	0089371281	MBT6039	AUTHORIZED	735296550	Refund Generated due to proration on Bill #0089371281-2025-2025-0000-00	Other Errors	4/7/2026	4/8/2026	001	TAX	($53.51)	$0.00	($53.51)
															015	TAX	($22.57)	$0.00	($22.57)
															003	TAX	($5.05)	$0.00	($5.05)
															005	TAX	($2.14)	$0.00	($2.14)
															004	TAX	($18.52)	$0.00	($18.52)
															002	TAX	($127.50)	$0.00	($127.50)
																		Refund	$229.29

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
SHKINDER, DAVID PETROVICH	SHKINDER, DAVID PETROVICH		3002 PADDINGTON DR		INDIAN TRAIL, NC 28079	Proration	0088839373	VHX5103	AUTHORIZED	859729458	Refund Generated due to proration on Bill #0088839373-2025-2025-0000-00	Vehicle Sold	4/16/2026	4/17/2026	001	TAX	($10.96)	$0.00	($10.96)
															600	TAX	($16.57)	$0.00	($16.57)
															023	TAX	($4.16)	$0.00	($4.16)
															003	TAX	($1.03)	$0.00	($1.03)
															005	TAX	($0.44)	$0.00	($0.44)
															004	TAX	($3.79)	$0.00	($3.79)
															002	TAX	($26.11)	$0.00	($26.11)
																		Refund	$63.06
SIMON, JEWEL SUSAN	SIMON, JEWEL SUSAN	SIMON, JEMY SUSAN	5020 MILLBRIDGE PKWY		WAXHAW, NC 28173	Proration	0067875759	TFZ3834	AUTHORIZED	983602824	Refund Generated due to proration on Bill #0067875759-2024-2024-0000-00	Vehicle Sold	4/21/2026	4/22/2026	001	TAX	($6.79)	$0.00	($6.79)
															500	TAX	($16.01)	$0.00	($16.01)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($2.17)	$0.00	($2.17)
															003	TAX	($0.73)	$0.00	($0.73)
															005	TAX	($0.16)	$0.00	($0.16)
															004	TAX	($1.21)	$0.00	($1.21)
															002	TAX	($15.56)	$0.00	($15.56)
																		Refund	$42.63
SINGH, JASVIR	SINGH, JASVIR	KAUR, RAMANDEEP	2053 AUTUMN DR		MONROE, NC 28110	Proration	0087084206	VBA7992	AUTHORIZED	861156884	Refund Generated due to proration on Bill #0087084206-2025-2025-0000-00	Vehicle Sold	4/23/2026	4/24/2026	001	TAX	($17.22)	$0.00	($17.22)
															200	TAX	($67.41)	$0.00	($67.41)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.63)	$0.00	($1.63)
															005	TAX	($0.69)	$0.00	($0.69)
															004	TAX	($5.96)	$0.00	($5.96)
															002	TAX	($41.03)	$0.00	($41.03)
																		Refund	$133.94
SMITH, TERESA MORRIS	SMITH, TERESA MORRIS	SMITH, DONALD PHILLIP JR	1004 JAMES ISLAND AVE		NORTH MYRTLE BEACH, SC 29582	Proration	0087898097	EHM4246	AUTHORIZED	738133650	Refund Generated due to proration on Bill #0087898097-2025-2025-0000-00	Reg . Out of state	4/23/2026	4/24/2026	001	TAX	($62.67)	$0.00	($62.67)
															023	TAX	($23.81)	$0.00	($23.81)
															003	TAX	($5.91)	$0.00	($5.91)
															005	TAX	($2.51)	$0.00	($2.51)
															004	TAX	($21.68)	$0.00	($21.68)
															002	TAX	($149.30)	$0.00	($149.30)
																		Refund	$265.88
SONG, YOSSEF	SONG, YOSSEF	XU, WENWEI	11669 JAMES RICHARD DR		CHARLOTTE, NC 28277	Proration	0080548674	LDW2528	AUTHORIZED	861155428	Refund Generated due to proration on Bill #0080548674-2024-2024-0000-00	Vehicle Totalled	4/23/2026	4/24/2026	001	TAX	($6.34)	$0.00	($6.34)
															800	TAX	($0.97)	$0.00	($0.97)
															026	TAX	($1.55)	$0.00	($1.55)
															003	TAX	($0.68)	$0.00	($0.68)
															005	TAX	($0.15)	$0.00	($0.15)
															004	TAX	($1.13)	$0.00	($1.13)
															002	TAX	($14.54)	$0.00	($14.54)
																		Refund	$25.36
STARNES, TAYLOR COLE	STARNES, TAYLOR COLE		2721 TRINITY CHURCH RD		MONROE, NC 28112	Proration	0072164591	KFP1733	AUTHORIZED	736446858	Refund Generated due to proration on Bill #0072164591-2024-2024-0000-00	Vehicle Sold	4/13/2026	4/14/2026	001	TAX	($0.51)	($0.04)	($0.55)
															029	TAX	($0.12)	($0.01)	($0.13)
															003	TAX	($0.05)	$0.00	($0.05)
															005	TAX	($0.01)	$0.00	($0.01)
															004	TAX	($0.09)	$0.00	($0.09)
															002	TAX	($1.18)	($0.06)	($1.24)
																		Refund	$2.07
STATON, WAVERLY ANN	STATON, WAVERLY ANN	STATON, SARAH ANN	608 SUNSET DR		MARSHVILLE, NC 28103	Proration	0016623821	TEZ2411	AUTHORIZED	857845380	Refund Generated due to proration on Bill #0016623821-2025-2025-0000-00	Vehicle Totalled	4/7/2026	4/8/2026	001	TAX	($2.77)	$0.00	($2.77)
															400	TAX	($11.59)	$0.00	($11.59)
															018	TAX	($1.65)	$0.00	($1.65)
															003	TAX	($0.27)	$0.00	($0.27)
															005	TAX	($0.11)	$0.00	($0.11)
															004	TAX	($0.96)	$0.00	($0.96)
															002	TAX	($6.60)	$0.00	($6.60)
																		Refund	$23.95
STEWART, PATRICK DYLAN	STEWART, PATRICK DYLAN		4693 SHANNAMARA DR		MATTHEWS, NC 28104	Proration	0078411334	TLA8817	AUTHORIZED	858372039	Refund Generated due to proration on Bill #0078411334-2024-2024-0000-00	Vehicle Sold	4/9/2026	4/10/2026	001	TAX	($1.39)	$0.00	($1.39)
															700	TAX	($1.84)	$0.00	($1.84)
															023	TAX	($0.43)	$0.00	($0.43)
															003	TAX	($0.15)	$0.00	($0.15)
															005	TAX	($0.03)	$0.00	($0.03)
															004	TAX	($0.25)	$0.00	($0.25)
															002	TAX	($3.18)	$0.00	($3.18)
																		Refund	$7.27
STEWART, ROBERT LARRY JR	STEWART, ROBERT LARRY JR		2621 SOUTHERN TRACE DR		WAXHAW, NC 28173	Proration	0051664372	EJX6790	AUTHORIZED	984464808	Refund Generated due to proration on Bill #0051664372-2025-2025-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($12.48)	$0.00	($12.48)
															500	TAX	($32.19)	$0.00	($32.19)
															500	VEHICLE FEE	($25.00)	$0.00	($25.00)
															028	TAX	($5.11)	$0.00	($5.11)
															003	TAX	($1.18)	$0.00	($1.18)
															005	TAX	($0.50)	$0.00	($0.50)
															004	TAX	($4.32)	$0.00	($4.32)
															002	TAX	($29.73)	$0.00	($29.73)
																		Refund	$110.51

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
STEWART, ROBERT LARRY JR	STEWART, ROBERT LARRY JR		2621 SOUTHERN TRACE DR		WAXHAW, NC 28173	Proration	0051664372	EJX6790	AUTHORIZED	984464832	Refund Generated due to proration on Bill #0051664372-2024-2024-0000-00	Vehicle Sold	4/24/2026	4/27/2026	001	TAX	($1.58)	$0.00	($1.58)
															500	TAX	($3.72)	$0.00	($3.72)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($0.50)	$0.00	($0.50)
															003	TAX	($0.17)	$0.00	($0.17)
															005	TAX	($0.04)	$0.00	($0.04)
															004	TAX	($0.28)	$0.00	($0.28)
															002	TAX	($3.61)	$0.00	($3.61)
																		Refund	$9.90
STRELTSOV, DMITRIY	STRELTSOV, DMITRIY		3020 OLDE ELIZABETH LN		MONROE, NC 28110	Proration	0089306493	MAL6760	AUTHORIZED	862094163	Refund Generated due to proration on Bill #0089306493-2025-2025-0000-00	Vehicle Totalled	4/28/2026	4/29/2026	001	TAX	($19.67)	$0.00	($19.67)
															200	TAX	($76.98)	$0.00	($76.98)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.86)	$0.00	($1.86)
															005	TAX	($0.78)	$0.00	($0.78)
															004	TAX	($6.81)	$0.00	($6.81)
															002	TAX	($46.85)	$0.00	($46.85)
																		Refund	$152.95
TALBERT, MAGAN MARIE	TALBERT, MAGAN MARIE	HARTSELL, JOHN STEVEN	1406 CIRCLE S RANCH RD		MONROE, NC 28112	Proration	0086547462	LCV2191	AUTHORIZED	736706010	Refund Generated due to proration on Bill #0086547462-2025-2025-0000-00	Vehicle Sold	4/15/2026	4/16/2026	001	TAX	($15.06)	$0.00	($15.06)
															029	TAX	($3.58)	$0.00	($3.58)
															003	TAX	($1.42)	$0.00	($1.42)
															005	TAX	($0.60)	$0.00	($0.60)
															004	TAX	($5.21)	$0.00	($5.21)
															002	TAX	($35.88)	$0.00	($35.88)
																		Refund	$61.75
TAYLOR, DAVID GEORGE	TAYLOR, DAVID GEORGE		513 WALDEN TRL		WAXHAW, NC 28173	Proration	0074925361	JDK4850	AUTHORIZED	858132310	Refund Generated due to proration on Bill #0074925361-2025-2025-0000-00	Vehicle Totalled	4/8/2026	4/9/2026	001	TAX	($39.43)	$0.00	($39.43)
															800	TAX	($12.27)	$0.00	($12.27)
															026	TAX	($10.66)	$0.00	($10.66)
															003	TAX	($3.72)	$0.00	($3.72)
															005	TAX	($1.58)	$0.00	($1.58)
															004	TAX	($13.65)	$0.00	($13.65)
															002	TAX	($93.95)	$0.00	($93.95)
																		Refund	$175.26
TAYLOR, DAVID GEORGE	TAYLOR, DAVID GEORGE		513 WALDEN TRL		WAXHAW, NC 28173	Proration	0070643420	KEA5549	AUTHORIZED	858132317	Refund Generated due to proration on Bill #0070643420-2025-2025-0000-00	Vehicle Sold	4/8/2026	4/9/2026	001	TAX	($52.86)	$0.00	($52.86)
															800	TAX	($16.46)	$0.00	($16.46)
															026	TAX	($14.30)	$0.00	($14.30)
															003	TAX	($4.99)	$0.00	($4.99)
															005	TAX	($2.12)	$0.00	($2.12)
															004	TAX	($18.30)	$0.00	($18.30)
															002	TAX	($125.96)	$0.00	($125.96)
																		Refund	$234.99
THE ESTATE OF JOHN DARREL PIGG	PIGG, JOHN DARREL		PO BOX 592		INDIAN TRAIL, NC 28079	Proration	0086853770	LKV9448	AUTHORIZED	862044512	Refund Generated due to proration on Bill #0086853770-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($0.70)	$0.00	($0.70)
															600	TAX	($1.05)	$0.00	($1.05)
															020	TAX	($0.29)	$0.00	($0.29)
															003	TAX	($0.07)	$0.00	($0.07)
															005	TAX	($0.03)	$0.00	($0.03)
															004	TAX	($0.24)	$0.00	($0.24)
															002	TAX	($1.66)	$0.00	($1.66)
																		Refund	$4.04
THE ESTATE OF JOHN DARREL PIGG	PIGG, JOHN DARREL		PO BOX 592		INDIAN TRAIL, NC 28079	Proration	0081771208	LFM3219	AUTHORIZED	862044540	Refund Generated due to proration on Bill #0081771208-2025-2025-0000-00	Vehicle Sold	4/27/2026	4/28/2026	001	TAX	($0.75)	$0.00	($0.75)
															600	TAX	($1.13)	$0.00	($1.13)
															020	TAX	($0.31)	$0.00	($0.31)
															003	TAX	($0.07)	$0.00	($0.07)
															005	TAX	($0.03)	$0.00	($0.03)
															004	TAX	($0.26)	$0.00	($0.26)
															002	TAX	($1.78)	$0.00	($1.78)
																		Refund	$4.33
TRAVERS, SCOTT TERENCE	TRAVERS, SCOTT TERENCE	TRAVERS, ROBBIN BURCHFIELD	8718 BEAMINSTER PL		WAXHAW, NC 28173	Proration	0047744385	PKJ3627	AUTHORIZED	737905974	Refund Generated due to proration on Bill #0047744385-2024-2024-0000-00	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($1.35)	$0.00	($1.35)
															026	TAX	($0.33)	$0.00	($0.33)
															003	TAX	($0.15)	$0.00	($0.15)
															005	TAX	($0.03)	$0.00	($0.03)
															004	TAX	($0.24)	$0.00	($0.24)
															002	TAX	($3.11)	$0.00	($3.11)
																		Refund	$5.21
VAN ZUTVEN, MARINUS ARNOLDUS	VAN ZUTVEN, MARINUS ARNOLDUS		125 SOUTHCLIFF DR		WAXHAW, NC 28173	Proration	0089564481	MBK4526	AUTHORIZED	981972400	Refund Generated due to proration on Bill #0089564481-2025-2025-0000-00	Reg . Out of state	4/14/2026	4/15/2026	001	TAX	($19.06)	$0.00	($19.06)
															500	TAX	($49.17)	$0.00	($49.17)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($7.80)	$0.00	($7.80)
															003	TAX	($1.80)	$0.00	($1.80)
															005	TAX	($0.77)	$0.00	($0.77)
															004	TAX	($6.60)	$0.00	($6.60)
															002	TAX	($45.41)	$0.00	($45.41)
																		Refund	$130.61

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
VAQAR, BEHZAD STEPHAN	VAQAR, BEHZAD STEPHAN	KRIEGER, JILL CHARLOTTE	868 SPEAR BRANCH RD		MOUNTAIN CITY, TN 37683	Proration	0087696922	DJL2549	AUTHORIZED	734663718	Refund Generated due to proration on Bill #0087696922-2025-2025-0000-00	Reg . Out of state	4/2/2026	4/6/2026	001	TAX	($8.19)	($0.41)	($8.60)
															026	TAX	($2.21)	($0.11)	($2.32)
															003	TAX	($0.77)	($0.04)	($0.81)
															005	TAX	($0.33)	($0.02)	($0.35)
															004	TAX	($2.83)	($0.14)	($2.97)
															002	TAX	($19.50)	($0.97)	($20.47)
																		Refund	$35.52
VAQAR, BEHZAD STEPHAN	VAQAR, BEHZAD STEPHAN	KRIEGER, JILL CHARLOTTE	868 SPEAR BRANCH RD		MOUNTAIN CITY, TN 37683	Proration	0042809540	EEP4747	AUTHORIZED	734663730	Refund Generated due to proration on Bill #0042809540-2024-2024-0000-00	Reg . Out of state	4/2/2026	4/6/2026	001	TAX	($18.24)	($0.90)	($19.14)
															026	TAX	($4.45)	($0.23)	($4.68)
															003	TAX	($1.95)	($0.10)	($2.05)
															005	TAX	($0.43)	($0.02)	($0.45)
															004	TAX	($3.26)	($0.17)	($3.43)
															002	TAX	($41.81)	($2.09)	($43.90)
																		Refund	$73.65
VAQAR, BEHZAD STEPHAN	VAQAR, BEHZAD STEPHAN	KRIEGER, JILL CHARLOTTE	868 SPEAR BRANCH RD		MOUNTAIN CITY, TN 37683	Proration	0051660519	JR9101	AUTHORIZED	734663772	Refund Generated due to proration on Bill #0051660519-2024-2024-0000-00	Reg . Out of state	4/2/2026	4/6/2026	001	TAX	($10.69)	$0.00	($10.69)
															026	TAX	($2.61)	$0.00	($2.61)
															003	TAX	($1.15)	$0.00	($1.15)
															005	TAX	($0.25)	$0.00	($0.25)
															004	TAX	($1.91)	$0.00	($1.91)
															002	TAX	($24.51)	$0.00	($24.51)
																		Refund	$41.12
VITHS GLOBAL HOLDING LLC	VITHS GLOBAL HOLDING LLC		8119 SKYECROFT COMMONS DR		WAXHAW, NC 28173	Proration	0087323794	HA6HA	AUTHORIZED	734229366	Refund Generated due to proration on Bill #0087323794-2025-2025-0000-00	Vehicle Sold	4/1/2026	4/2/2026	001	TAX	($24.35)	$0.00	($24.35)
															026	TAX	($6.59)	$0.00	($6.59)
															003	TAX	($2.30)	$0.00	($2.30)
															005	TAX	($0.97)	$0.00	($0.97)
															004	TAX	($8.43)	$0.00	($8.43)
															002	TAX	($58.02)	$0.00	($58.02)
																		Refund	$100.66
WEBBER, KATIE ELIZABETH	WEBBER, KATIE ELIZABETH		3907 HORSHAM ST		INDIAN LAND, SC 29707	Proration	0084575527	TEM1482	AUTHORIZED	984178152	Refund Generated due to proration on Bill #0084575527-2024-2024-0000-00	Reg . Out of state	4/23/2026	4/24/2026	001	TAX	($7.95)	$0.00	($7.95)
															500	TAX	($18.75)	$0.00	($18.75)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($2.55)	$0.00	($2.55)
															003	TAX	($0.85)	$0.00	($0.85)
															005	TAX	($0.19)	$0.00	($0.19)
															004	TAX	($1.42)	$0.00	($1.42)
															002	TAX	($18.23)	$0.00	($18.23)
																		Refund	$49.94
WONG, CRISTOBAL RAFAEL	WONG, CRISTOBAL RAFAEL		437 CALEB ST		MONROE, NC 28110	Adjustment < $100	0070937363	JDR2288	PENDING	860651694	Refund Generated due to adjustment on Bill #0070937363-2025-2025-0000-00	Mileage	4/21/2026		001	TAX	($2.72)	$0.00	($2.72)
															200	TAX	($10.66)	$0.00	($10.66)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.25)	$0.00	($0.25)
															005	TAX	($0.11)	$0.00	($0.11)
															004	TAX	($0.94)	$0.00	($0.94)
															002	TAX	($6.49)	$0.00	($6.49)
																		Refund	$21.17
YESAYAN, NAIRA	YESAYAN, NAIRA		1008 LITTLE ROCK CT		MONROE, NC 28110	Proration	0087994890	LLT1674	AUTHORIZED	860890352	Refund Generated due to proration on Bill #0087994890-2025-2025-0000-00	Vehicle Sold	4/22/2026	4/23/2026	001	TAX	($15.65)	$0.00	($15.65)
															600	TAX	($23.67)	$0.00	($23.67)
															019	TAX	($6.90)	$0.00	($6.90)
															003	TAX	($1.47)	$0.00	($1.47)
															005	TAX	($0.62)	$0.00	($0.62)
															004	TAX	($5.41)	$0.00	($5.41)
															002	TAX	($37.28)	$0.00	($37.28)
																		Refund	$91.00
ZAUKAS, JOSHUA RUPEL	ZAUKAS, JOSHUA RUPEL		7317 STONEHAVEN DR		WAXHAW, NC 28173	Proration	0083362758	TAH9863	AUTHORIZED	983601080	Refund Generated due to proration on Bill #0083362758-2024-2024-0000-00	Vehicle Sold	4/21/2026	4/23/2026	001	TAX	($25.42)	$0.00	($25.42)
															101	TAX	($12.46)	$0.00	($12.46)
															101	VEHICLE FEE	$0.00	$0.00	$0.00
															026	TAX	($6.20)	$0.00	($6.20)
															003	TAX	($2.73)	$0.00	($2.73)
															005	TAX	($0.61)	$0.00	($0.61)
															004	TAX	($4.55)	$0.00	($4.55)
															002	TAX	($58.29)	$0.00	($58.29)
																		Refund	$110.26
																		Refund Total	$14078.56

Union County Government
Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-307 **Agenda Date:** 6/1/2026

TITLE:

2025 Communications Year End Report

INFORMATION CONTACT:

Liz Cooper, Public Communications, Director, 704-283-3587

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This report provides valuable metrics and insights into communication platforms and our efforts to collaborate with all County departments to inform and engage residents, promote programs and services, and strengthen internal and external communications. This report includes information for the calendar year 2025.

FINANCIAL IMPACT:

None.

UNIONCOUNTY
north carolina









2025 Communications Year End Report







Total Projects

1,240 Projects Completed

All 35 Departments Supported

Top 5 Campaigns

1 Government Center Renovations

The first floor entrance and corridor at the Government Center underwent renovations during the second half of 2025 that required all visitors and staff to temporarily enter on the ground floor. Public Communications coordinated a comprehensive campaign including facility signage (A-frames, window clings, posters, etc.) and a wide variety of graphics and announcements via social media, website, employee emails, and a custom Google Maps message.





2 Jesse Helms Park Playground Opening

Public Communications supported Parks & Recreation with celebrating the opening of a new farm-themed playground at Jesse Helms Park in May. Communications and marketing efforts included a ribbon-cutting event, custom paper fans highlighting the playground's features, a video, press release, social media posts, and more.

3 Foster Parent Recruitment

Our Foster Parent Recruitment campaign, in partnership with Social Services, elevated awareness of the urgent need for foster parents using authentic storytelling, fresh visuals, and a targeted outreach strategy. With in-house design and video, community events, and digital promotion, the campaign sparked deeper engagement and strengthened the pipeline for future foster parent interest.



Top 5 Campaigns | Continued

4 Christmas Bureau (July & December)

Union County's first-ever Christmas (Bureau) in July campaign highlighted the many ways our community supports local families during the holiday season. We showcased programs like Project E.L.F., Christmas Cheer Champions, and Toys for Tots, while raising funds to provide gift cards for teens in need. We produced numerous additional projects during the holiday season to share about Christmas Bureau donations, volunteers and impact.





5 Benefit Changes

With benefit changes affecting all County employees, Public Communications worked with Human Resources to ensure 100% of employees were aware of a new electronic open enrollment process. We provided clear, accessible information and with numerous reminders in multiple formats. A secondary goal was to build understanding and confidence in the enhanced benefits program.

Critical Communications:

- Winter Storms (Two in January, One in February)
- Public Health Communications due to Monroe Boil Water notice (August)
- Tornado in Unionville (March)
- Burn Ban (March)

Digital Accessibility

- Website Document Cleanup
- Employee Trainings
- Updated County Templates
- Revised Brand Guide
- Contacted Third-Party Website Vendors

Department Highlights

Team Awards Received

State | National | International

Within a span of 2.5 months in the spring of 2025, the Public Communications Department was recognized with seven prestigious awards at the state, national and international levels, highlighting the County's commitment to effectively communicating with residents in creative and strategic ways.

Department Restructure

In July 2025, the department was restructured with Megan Hinkle's promotion to Assistant Director, allowing a strategic shift to best support the team. Following the restructure, half of the team reports to Megan, with the other half reporting to Director Liz Cooper.

Public Records Requests

643 Received ▶ **612** Completed

Media Interactions

285



Union County Horizon:

Community e-Newsletter

54,021 Total Subscribers

Website

Top Search Terms

1. Passport
2. Jobs/Careers
3. Pay Bill
4. Property Tax
5. Water

Top Webpages

1. GIS & Mapping
2. Taxes & Property
3. Cane Creek Park

Website Visits

unioncountync.gov

4,547,068

-1.3% vs. previous year

Sprout Automated Webchat

Let's Chat

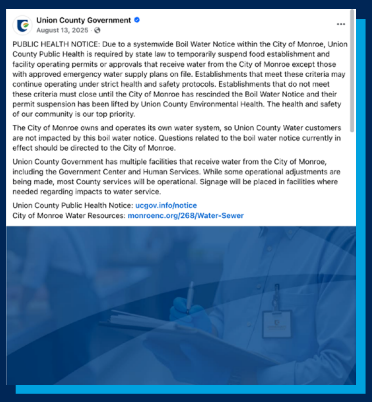
7,141 Total Communications

Social Media

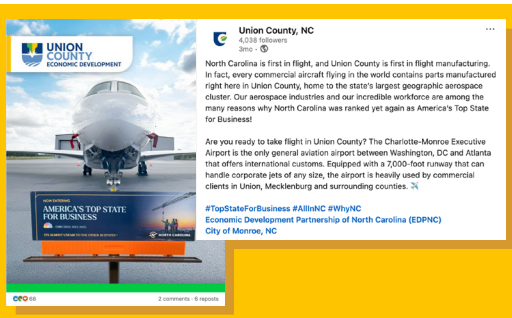
42,964 Total Followers

+2,349 New Followers

Top Posts



Facebook
Boil Water Notice for City of Monroe
9.6% Engagement Rate
59,746 Reach



LinkedIn
Flat Stanley Billboard
5.2% Engagement Rate
3,012 Impressions



Instagram
Confirmed Tornado
5.6% Engagement Rate
2,648 Impressions

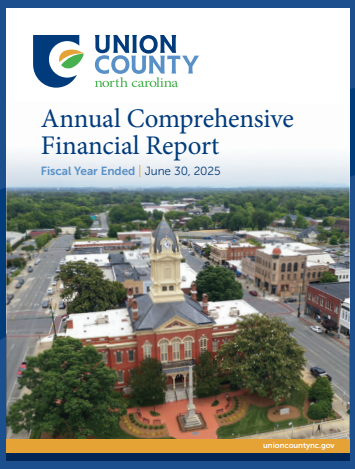
Engagement rate is calculated by dividing the total number of interactions on a post (likes, comments, shares, clicks) by the total number of impressions that post received, then multiplying by 100 to get a percentage. **Impressions** are the number of times a user sees a post. **Reach** refers to the total number of individuals who saw a specific post on social media.

Creative Highlights

Economic Development Logo



Cane Creek Park Branding



Annual Comprehensive Financial Report



Business NC Magazine Ad

Video Engagement

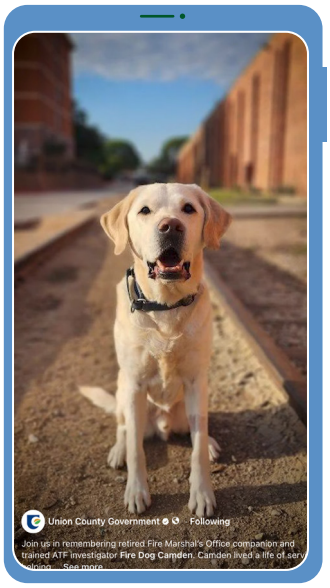


YouTube

58,300 Views | 5,800 Hours Watch Time | 186 New Subscribers

Top 3 Videos:

- Union County Water | Drops of Knowledge | Toilet Dye Test
- Historical Cotton Gin on display at the Agricultural Center
- New Farm-Themed Playground Opens at Jesse Helms Park



Facebook

Remembering Camden

5,373 Views



Instagram

Remembering Camden

1,087 Views

Union County Government Center
500 North Main Street
Monroe, North Carolina
www.unioncountync.gov

File #: 26-318 **Agenda Date:** 6/1/2026

TITLE:

April 2026 Union County Public Schools Monthly Report

INFORMATION CONTACT:

Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This is the monthly report from UCPS as required by the Budget Ordinance.

FINANCIAL IMPACT:

None.

UNION COUNTY PUBLIC SCHOOLS
EDUCATE • INNOVATE • GRADUATE

400 North Church Street
Monroe, NC 28112
704.296.9898
704.282.2171
www.ucpsnc.org

FINANCE DIVISION

To: Beverly Liles

From: Shanna McLamb

Date: May 14, 2026

RE: Monthly Reporting – Ordinance Sections XXIII

Pursuant to the requested information included in the BOCC annual budget ordinance, the below information has been provided to satisfy the requirements for monthly reporting. Notes have been provided for each requested item to provide explanation for items that are currently unavailable or incomplete due reporting capabilities related to the state software migration.

FY2026 Ordinance Section XXIII - as it appears in the ordinance document

In accordance with the NCGS §115C-429(c), the Board of County Commissioners calls for, for FY 2026, the books, records, audit reports, and other information bearing on the financial operation of UCPS listed below to be made available to the Board of Commissioners as set forth herein. Each of the monthly reports and counts described below is called for within ten business days of the close of each month, beginning with the close of July 2025.

(a) A monthly report of monthly and cumulative revenues and expenditures, by function code, for all funds by fund. In addition, the original adopted budget and revised or amended budget for revenues and expenditures, by function code.

(b) A monthly report of monthly expenditures, by project for appropriations outlined in section XXII and "Capital Projects Ordinance", including a brief summary of the status of the project.

(c) A monthly report of monthly expenditures, by project for all other capital projects, including a brief summary of the status of the project.

(d) A monthly report of transfers between function codes for all funds by fund. NOTE: There is no information to provide at this time.

(e) A monthly personnel count of locally funded employees and state funded employees broken down by function code from which they are paid, furthermore, the Board of County Commissioners requests not to receive the payroll records in response to this request.

(f) A monthly ADM count.

Thank you.

CC: Andrew G. Houlihan
Brian Matthews

In compliance with federal law, UCPS administers all educational programs, employment activities and admissions without discrimination against any person on the basis of gender, race, color, religion, national origin, age or disability.

Union County Public Schools
YTD Budget Report
April 30, 2026

FUND	F1	Type2	2digPu	Purpose Description	Values Current Budget	YTD Rev/Exp	Encumb & Req	Rem Budget
10	State	Expense	51	Regular Instructions Services	$185,528,352.58	$153,381,426.71	$777,086.24	$31,369,839.63
			52	Special Populations Services	$44,834,642.98	$38,736,623.52	$880,998.59	$5,217,020.87
			53	Alternative Programs and Services	$5,001,792.25	$3,374,026.44	$1,057.65	$1,626,708.16
			54	School Leadership Services	$12,725,067.44	$10,861,943.45	$1,594.68	$1,861,529.31
			55	Co-Curricular Services	$6,987.53	$0.00	$0.00	$6,987.53
			58	School-Based Support Services	$12,726,237.03	$16,308,547.64	$118,756.97	-$3,701,067.58
			61	Support and Development Services	$350,816.98	$215,527.64	$533.75	$134,755.59
			62	Special Population Support and Development Services	$346,291.08	$142,330.70	$0.00	$203,960.38
			63	Alternative Programs and Services Support and Development Services	$4,522.22	$0.00	$0.00	$4,522.22
			64	Technology Support Services	$2,088,003.73	$474,049.34	$793,533.72	$820,420.67
			65	Operational Support Services	$36,793,234.99	$29,063,417.46	$402,833.18	$7,326,984.35
			66	Financial and Human Resource Services	$338,362.30	$144,484.45	$0.00	$193,877.85
			67	Accountability Services	$1,118.63	$0.00	$0.00	$1,118.63
			68	System-Wide Pupil Support Services	$14,073.29	$0.00	$0.00	$14,073.29
			69	Policy, Leadership and Public Relations Services	$641,449.09	$491,572.85	$0.00	$149,876.24
			71	Community Services	$0.00	$0.00	$0.00	$0.00
			72	Nutrition Services	$1,586.00	$63,161.43	$0.00	-$61,575.43
			81	Payments to Other Governmental Units	$0.00	-$8,845.29	$0.00	$8,845.29
			84	Unbudgeted Funds	$0.00	$0.00	$0.00	$0.00
		Expense Total			$301,402,538.12	$253,248,266.34	$2,976,394.78	$45,177,877.00
		Revenue	33	Other State Allocations for Current Operations	-$301,402,538.12	-$253,248,266.34	$0.00	-$48,154,271.78
		Revenue Total			-$301,402,538.12	-$253,248,266.34	$0.00	-$48,154,271.78
	State Total				**$0.00**	**$0.00**	**$2,976,394.78**	**-$2,976,394.78**
10 Total					**$0.00**	**$0.00**	**$2,976,394.78**	**-$2,976,394.78**
20	Local	Expense	51	Regular Instructions Services	$32,962,731.00	$35,541,674.12	$2,298,203.46	-$4,877,146.58
			52	Special Populations Services	$6,100,949.00	$5,007,435.37	$19,169.42	$1,074,344.21
			53	Alternative Programs and Services	$5,413,543.00	$3,271,974.88	$647.97	$2,140,920.15
			54	School Leadership Services	$15,125,578.50	$12,272,733.61	$107,085.17	$2,745,759.72
			55	Co-Curricular Services	$2,468,938.00	$1,786,973.19	$29,365.19	$652,599.62
			58	School-Based Support Services	$10,571,700.12	$8,870,026.82	$291,310.55	$1,410,362.75
			61	Support and Development Services	$3,177,252.50	$2,506,323.35	$12,745.95	$658,183.20
			62	Special Population Support and Development Services	$408,978.00	$521,288.89	$0.00	-$112,310.89
			63	Alternative Programs and Services Support and Development Services	$176,490.00	$137,027.18	$0.00	$39,462.82
			64	Technology Support Services	$4,400,087.88	$3,765,102.78	$46,344.77	$588,640.33
			65	Operational Support Services	$29,921,087.00	$23,693,271.94	$1,395,144.29	$4,832,670.77
			66	Financial and Human Resource Services	$9,360,881.00	$7,623,064.62	$387,898.47	$1,349,917.91
			67	Accountability Services	$636,630.00	$387,806.09	$20,477.32	$228,346.59
			68	System-Wide Pupil Support Services	$584,660.00	$609,684.82	$35,643.47	-$60,668.29
			69	Policy, Leadership and Public Relations Services	$3,804,770.00	$3,042,101.67	$143,544.31	$619,124.02
			71	Community Services	$135,000.00	$438.82	$0.00	$134,561.18
			72	Nutrition Services	$442,377.00	$208,494.39	$0.00	$233,882.61
			81	Payments to Other Governmental Units	$14,517,960.00	$11,145,905.55	$0.00	$3,372,054.45
			86	Educational Foundations	$0.00	$0.00	$0.00	$0.00
			84	Unbudgeted Funds	$0.00	$0.00	$0.00	$0.00
		Expense Total			$140,209,613.00	$120,391,328.09	$4,787,580.34	$15,030,704.57
		Revenue	44	Local Sources - Unrestricted	-$140,209,613.00	-$117,046,378.27	$0.00	-$23,163,234.73
		Revenue Total			-$140,209,613.00	-$117,046,378.27	$0.00	-$23,163,234.73
	Local Total				**$0.00**	**$3,344,949.82**	**$4,787,580.34**	**-$8,132,530.16**
20 Total					**$0.00**	**$3,344,949.82**	**$4,787,580.34**	**-$8,132,530.16**

Union County Public Schools
YTD Budget Report
April 30, 2026

FUND	F1	Type2	2digPu	Purpose Description	Current Budget	YTD Rev/Exp	Encumb & Req	Rem Budget
30	Federal	Expense	51	Regular Instructions Services	$1,539,454.57	$873,446.75	$84,544.49	$581,463.33
			52	Special Populations Services	$11,281,112.19	$5,546,908.24	$0.00	$5,734,203.95
			53	Alternative Programs and Services	$7,072,865.87	$4,017,741.64	$270,572.33	$2,784,551.90
			54	School Leadership Services	$136,683.17	$36,683.17	$0.00	$100,000.00
			55	Co-Curricular Services	$0.00	$0.00	$0.00	$0.00
			58	School-Based Support Services	$1,182,359.02	$651,737.48	$113,895.51	$416,726.03
			61	Support and Development Services	$35,149.64	$63,667.28	$0.00	-$28,517.64
			62	Special Population Support and Development Services	$256,169.89	$174,947.94	$0.00	$81,221.95
			63	Alternative Programs and Services Support and Development Services	$198,901.54	$108,771.65	$0.00	$90,129.89
			64	Technology Support Services	$0.00	$0.00	$0.00	$0.00
			65	Operational Support Services	$306,958.91	$2,504.23	$0.00	$304,454.68
			66	Financial and Human Resource Services	$0.00	$0.00	$0.00	$0.00
			67	Accountability Services	$0.00	$0.00	$0.00	$0.00
			68	System-Wide Pupil Support Services	$0.00	$0.00	$0.00	$0.00
			69	Policy, Leadership and Public Relations Services	$0.00	$0.00	$0.00	$0.00
			71	Community Services	$0.00	$0.00	$0.00	$0.00
			72	Nutrition Services	$0.00	$0.00	$0.00	$0.00
			81	Payments to Other Governmental Units	$855,595.60	$181,989.80	$0.00	$673,605.80
			82	Unbudgeted Funds	$1,372,811.31	$0.00	$0.00	$1,372,811.31
		Expense Total			$24,238,061.71	$11,658,398.18	$469,012.33	$12,110,651.20
		Revenue	33	Other State Allocations for Current Operations	-$24,238,061.71	-$11,658,398.18	$0.00	-$12,579,663.53
			44	Local Sources - Unrestricted	$0.00	$0.00	$0.00	$0.00
		Revenue Total			-$24,238,061.71	-$11,658,398.18	$0.00	-$12,579,663.53
	Federal Total				**$0.00**	**$0.00**	**$469,012.33**	**-$469,012.33**
30 Total					**$0.00**	**$0.00**	**$469,012.33**	**-$469,012.33**
40	Capital	Expense	51	Regular Instructions Services	$4,490,753.00	$4,191,829.38	$164,882.40	$134,041.22
			52	Special Populations Services	$0.00	$3,585.86	$0.00	-$3,585.86
			53	Alternative Programs and Services	$0.00	$0.00	$0.00	$0.00
			54	School Leadership Services	$0.00	$0.00	$0.00	$0.00
			55	Co-Curricular Services	$8,108,217.65	$282,728.80	$83,585.49	$7,741,903.36
			58	School-Based Support Services	$0.00	$0.00	$0.00	$0.00
			64	Technology Support Services	$0.00	$98,524.64	$354,899.77	-$453,424.41
			65	Operational Support Services	$6,870,166.94	$1,766,741.99	$5,190,252.12	-$86,827.17
			69	Policy, Leadership and Public Relations Services	$0.00	$6,804.29	$849.35	-$7,653.64
			72	Nutrition Services	$250,000.00	$0.00	$0.00	$250,000.00
			90	Capital Outlay	$104,911,323.67	$26,472,925.31	$30,522,453.91	$47,915,944.45
			83	Unbudgeted Funds	$0.00	$0.00	$0.00	$0.00
			91	Capital Outlay	$0.00	$0.00	$0.00	$0.00
			92	Capital Outlay	$0.00	$0.00	$0.00	$0.00
		Expense Total			$124,630,461.26	$32,823,140.27	$36,316,923.04	$55,490,397.95
		Revenue	33	Other State Allocations for Current Operations	-$13,035,701.62	-$11,043.62	$0.00	-$13,024,658.00
			44	Local Sources - Unrestricted	-$111,594,759.64	-$32,594,106.18	$0.00	-$79,000,653.46

Union County Public Schools
YTD Budget Report
April 30, 2026

FUND	F1	Type2	2digPu	Purpose Description	Current Budget	YTD Rev/Exp	Encumb & Req	Rem Budget
40	Capital	Revenue Total			-$124,630,461.26	-$32,605,149.80	$0.00	-$92,025,311.46
	Capital Total				$0.00	$217,990.47	$36,316,923.04	-$36,534,913.51
40 Total					$0.00	$217,990.47	$36,316,923.04	-$36,534,913.51
50	School Nutritic	Expense	72	Nutrition Services	$22,583,377.00	$12,661,232.44	$0.00	$9,922,144.56
			81	Payments to Other Governmental Units	$1,027,946.00	$0.00	$0.00	$1,027,946.00
		Expense Total			$23,611,323.00	$12,661,232.44	$0.00	$10,950,090.56
		Revenue	33	Other State Allocations for Current Operations	-$14,145,547.00	-$7,144,569.46	$0.00	-$7,000,977.54
			44	Local Sources - Unrestricted	-$9,465,776.00	-$4,638,165.79	$0.00	-$4,827,610.21
		Revenue Total			-$23,611,323.00	-$11,782,735.25	$0.00	-$11,828,587.75
	School Nutrition Total				$0.00	$878,497.19	$0.00	-$878,497.19
50 Total					$0.00	$878,497.19	$0.00	-$878,497.19
57	After School	Expense	71	Community Services	$3,550,225.00	$1,959,930.65	$23,189.73	$1,567,104.62
			81	Payments to Other Governmental Units	$150,000.00	$0.00	$0.00	$150,000.00
		Expense Total			$3,700,225.00	$1,959,930.65	$23,189.73	$1,717,104.62
		Revenue	33	Other State Allocations for Current Operations	-$3,000.00	$0.00	$0.00	-$3,000.00
			44	Local Sources - Unrestricted	-$3,697,225.00	-$2,064,773.79	$0.00	-$1,632,451.21
		Revenue Total			-$3,700,225.00	-$2,064,773.79	$0.00	-$1,635,451.21
	After School Total				$0.00	-$104,843.14	$23,189.73	$81,653.41
57 Total					$0.00	-$104,843.14	$23,189.73	$81,653.41
80	Other Special	Expense	51	Regular Instructions Services	$3,993,521.44	$1,378,819.45	$93,901.88	$2,520,800.11
			52	Special Populations Services	$2,932,863.71	$2,148,519.24	$214,117.23	$570,227.24
			53	Alternative Programs and Services	$1,370,368.49	$1,049,693.92	$7,448.94	$313,225.63
			54	School Leadership Services	$0.00	$0.00	$0.00	$0.00
			55	Co-Curricular Services	$67,235.07	$28,132.55	$917.01	$38,185.51
			58	School-Based Support Services	$1,182,782.85	$750,367.04	$78,162.68	$354,253.13
			61	Support and Development Services	$6,078.91	$1,130.48	$613.81	$4,334.62
			62	Special Population Support and Development Services	$4,000.00	$2,769.51	$0.00	$1,230.49
			63	Alternative Programs and Services Support and Development Services	$0.00	$0.00	$0.00	$0.00
			64	Technology Support Services	$165,000.00	$19,339.59	$65,660.85	$79,999.56
			65	Operational Support Services	$1,045,826.52	$102,868.19	$128,344.41	$814,613.92
			66	Financial and Human Resource Services	$18,450.00	$1,013.40	$25,207.13	-$7,770.53
			67	Accountability Services	$9,066.81	$0.00	$0.00	$9,066.81
			68	System-Wide Pupil Support Services	$0.00	$0.00	$0.00	$0.00
			69	Policy, Leadership and Public Relations Services	$250.00	$250.00	$250.00	-$250.00
			71	Community Services	$161,265.14	$112,201.22	$3,523.00	$45,540.92
			72	Nutrition Services	$0.00	$2,401.80	$0.00	-$2,401.80
			81	Payments to Other Governmental Units	$29,593.02	$0.00	$0.00	$29,593.02
			82	Unbudgeted Funds	$0.00	$0.00	$0.00	$0.00
			86	Educational Foundations	$35,675.00	$35,675.00	$0.00	$0.00
			87	Scholarships	$96,707.89	$401.20	$0.00	$96,306.69
			84	Unbudgeted Funds	$0.00	$0.00	$0.00	$0.00
		Expense Total			$11,118,684.85	$5,633,582.59	$618,146.94	$4,866,955.32
		Revenue	33	Other State Allocations for Current Operations	-$2,415,626.01	-$2,541,351.07	$0.00	$125,725.06
			44	Local Sources - Unrestricted	-$8,703,058.84	-$3,137,488.93	$0.00	-$5,565,569.91
		Revenue Total			-$11,118,684.85	-$5,678,840.00	$0.00	-$5,439,844.85
	Other Special Total				$0.00	-$45,257.41	$618,146.94	-$572,889.53
80 Total					$0.00	-$45,257.41	$618,146.94	-$572,889.53
Grand Total					$0.00	$4,291,336.93	$45,191,247.16	-$49,482,584.09

Capital Projects
April 2026

Description	Project Type	Revised Budget	Actuals	Encumbrances	Act/Enc/Req	AvailableBudget
BOND UNALLOCATED SALES TAX	BOND	$14,247.00	$0.00	$0.00	$0.00	$14,247.00
EAST ELEMENTARY - NEW SCHOOL	BOND	$44,092,589.00	$43,745,976.56	$14,984.89	$43,760,961.45	$331,627.55
EAST UNION MIDDLE PHASE II	BOND	$28,430,000.00	$2,854,501.05	$24,907,458.95	$27,761,960.00	$668,040.00
FOREST HILLS HIGH - NEW SCHOOL	BOND	$104,939,411.00	$92,283,777.16	$6,994,814.41	$99,278,591.57	$5,660,819.43
FY23 BAND UNIFORMS & EQUIP		$50,000.00	$49,623.97	$0.00	$49,623.97	$376.03
FY23 BUILDING SYSTEMS		$8,639,286.00	$8,484,605.48	$89,154.75	$8,573,760.23	$65,525.77
FY24 ADA PROJECTS	CIP	$144,900.10	$143,985.98	$0.00	$143,985.98	$914.12
FY24 BAND UNIFORMS & EQUIP	CIP	$50,000.00	$49,816.20	$0.00	$49,816.20	$183.80
FY24 BUILDING SYSTEMS	CIP	$8,598,550.00	$5,747,433.67	$819,365.03	$6,566,798.70	$2,031,751.30
EAST UNION MIDDLE DESIGN	CIP	$2,721,015.00	$1,474,127.09	$421,225.23	$1,895,352.32	$825,662.68
FY24 EXPANSION & RENOVATIONS	CIP	$4,719,548.00	$3,082,574.35	$808,935.07	$3,891,509.42	$828,038.58
FY24 FURNITURE & EQUIPMENT	CIP	$120,750.00	$66,388.46	$53,057.03	$119,445.49	$1,304.51
MARVIN RIDGE HIGH HVAC CONTROLS	CIP	$1,129,013.00	$393,948.18	$25,980.82	$419,929.00	$709,084.00
FY24 PAINTING	CIP	$1,298,325.00	$1,072,954.51	$29,542.00	$1,102,496.51	$195,828.49
FY24 ROOFING	CIP	$2,307,946.00	$1,269,857.81	$72,250.00	$1,342,107.81	$965,838.19
FY24 SAFETY & SECURITY	CIP	$505,943.00	$420,160.94	$8,600.00	$428,760.94	$77,182.06
FY24 VEHICLES & EQUIPMENT	CIP	$970,043.00	$959,677.52	$10,144.66	$969,822.18	$220.82
FY25 BAND UNIFORMS & EQUIP	CIP	$50,000.00	$49,998.03	$0.00	$49,998.03	$1.97
FY25 BUILDING SYSTEMS	CIP	$3,332,600.00	$1,805,675.79	$267,475.22	$2,073,151.01	$1,259,448.99
FY25 EXPANSION & RENOVATIONS	CIP	$4,469,410.00	$2,870,936.32	$646,173.95	$3,517,110.27	$952,299.73
FY25 FURNITURE & EQUIPMENT	CIP	$2,500,000.00	$788,739.32	$398,773.24	$1,187,512.56	$1,312,487.44
MARVIN RIDGE HIGH CHILLERS	CIP	$2,640,000.00	$1,944,006.63	$16,560.64	$1,960,567.27	$679,432.73
FY25 SAFETY & SECURITY	CIP	$468,600.00	$395,889.42	$6,893.81	$402,783.23	$65,816.77
FY25 VEHICLES & EQUIPMENT	CIP	$3,020,425.00	$3,003,298.51	$12,989.67	$3,016,288.18	$4,136.82
FY26 BAND UNIFORMS & EQUIP	CIP	$50,000.00	$49,999.98	$0.00	$49,999.98	$0.02
FY26 BUILDING SYSTEMS	CIP	$7,390,375.00	$188,263.73	$1,436,077.55	$1,624,341.28	$5,766,033.72
FY26 CAFETERIA EQUIP	CIP	$250,000.00	$0.00	$0.00	$0.00	$250,000.00
FY26 EXPANSIONS & RENOVATIONS	CIP	$1,577,000.00	$16,617.00	$0.00	$16,617.00	$1,560,383.00
NEW SALEM AUDITORIUM UPGRADES	CIP	$145,000.00	$0.00	$29,982.75	$29,982.75	$115,017.25
FY26 PAINTING	CIP	$1,298,838.00	$0.00	$63,800.00	$63,800.00	$1,235,038.00
FY26 ROOFING	CIP	$3,500,000.00	$0.00	$0.00	$0.00	$3,500,000.00
FY26 SAFETY & SECURITY	CIP	$294,063.00	$42,733.40	$133,509.96	$176,243.36	$117,819.64
FY26 TRANSPORTATION VEH & EQUIP	CIP	$560,000.00	$554,148.73	$0.00	$554,148.73	$5,851.27
FY26 VEHICLES & EQUIPMENT	CIP	$783,000.00	$666,841.76	$58,020.16	$724,861.92	$58,138.08
LAPTOP LEASES		$17,654,112.75	$16,964,466.38	$2,338,467.15	$19,302,933.53	($1,648,820.78)
PWHS BOND PROJECT - NEW SCH	BOND	$10,995,000.00	$80,900.00	$27,000.00	$107,900.00	$10,887,100.00
STATE CAPITAL IMPROVEMENT FUNDS		$1,811,789.30	$1,811,043.62	$0.00	$1,811,043.62	$745.68
STATE CAPITAL IMPROVEMENT FUNDS		$8,000,000.00	$0.00	$35,923.75	$35,923.75	$7,964,076.25

PURPOSE / FUNCTION	OBJECT CODE	DESCRIPTION	STATE PUBLIC SCHOOL FUND	LOCAL CURRENT EXPENSE FUND	FEDERAL GRANT FUND	CHILD NUTRITION FUND	AFTER SCHOOL PROGRAM FUND	OTHER SPECIFIC REVENUE FUND	GRAND TOTAL
	111	**SUPERINTENDENT**	**1**						**1**
6900		Policy, Leadership and Public Relations Services	1						1
	113	**DIRECTOR/SUPERVISOR**	**2**	**21**		**1**			**24**
5500		Co-Curricular Services		2					2
6100		Support and Development Services		8					8
6100		Support and Development Services		1					1
6200		Special Population Support and Development Services	1	2					3
6300		Alternative Programs and Services Support and Development Services		1					1
6400		Technology Support Services		2					2
6500		Operational Support Services	1						1
6500		Operational Support Services		1					1
6600		Financial and Human Resource Services		1					1
6800		System-Wide Pupil Support Services		1					1
6900		Policy, Leadership and Public Relations Services		2					2
7200		Nutrition Services				1			1
	114	**PRINCIPAL**	**51**	**2**					**53**
5400		School Leadership Services	51	2					53
	115	**FINANCE OFFICER**	**1**						**1**
6600		Financial and Human Resource Services	1						1
	116	**ASSISTANT PRINCIPAL(NON TEACH)**	**24**	**69**					**93**
5400		School Leadership Services	24	69					93
	117	**ASSISTANT PRINCIPAL-OTH ASSIGN**	**2**	**5**					**7**
5400		School Leadership Services	2	5					7
	118	**ASSISTANT SUPERINTENDENT**	**2**	**3**					**5**
6600		Financial and Human Resource Services		1					1
6900		Policy, Leadership and Public Relations Services	2	2					4
	121	**TEACHER**	**2200**	**21**	**74**			**8**	**2303**
5100		Regular Instructions Services	1425	19	5				1449
5100		Regular Instructions Services		1					1
5100		Regular Instructions Services	166						166
5100		Regular Instructions Services	13						13
5100		Regular Instructions Services	125						125
5100		Regular Instructions Services	118	1					119
5100		Regular Instructions Services	57						57
5200		Special Populations Services	167		43			2	212
5200		Special Populations Services	21		3				24
5200		Special Populations Services	46						46
5200		Special Populations Services	46						46
5300		Alternative Programs and Services	16						16
5300		Alternative Programs and Services			14				14
5300		Alternative Programs and Services			9			6	15
	122	**INTERIM TEACHER**		**7**					**7**
5100		Regular Instructions Services		7					7
	123	**JROTC TEACHER**						**10**	**10**
5100		Regular Instructions Services						10	10
	124	**FOREIGN EXCHANGE (VIF)**	**117**						**117**
5100		Regular Instructions Services	20						20
5100		Regular Instructions Services	91						91
5200		Special Populations Services	5						5
5200		Special Populations Services	1						1
	127	**MASTER TEACHER**	**10**	**1**					**11**
5100		Regular Instructions Services	10	1					11
	131	**INSTRUCTIONAL SUPPORT I**	**192**	**34**	**5**			**7**	**238**
5100		Regular Instructions Services	10						10
5200		Special Populations Services	6	1					7
5200		Special Populations Services	2					1	3
5200		Special Populations Services						1	1
5300		Alternative Programs and Services	4	4	1				9
5300		Alternative Programs and Services			3				3
5800		School-Based Support Services	43	5					48
5800		School-Based Support Services	81	24	1			2	108
5800		School-Based Support Services	46					3	49
	132	**INSTRUCTIONAL SUPPORT II**	**40**		**4**			**1**	**45**
5200		Special Populations Services	39		4				43
5200		Special Populations Services	1					1	2
	133	**PSYCHOLOGIST**	**16**						**16**
5200		Special Populations Services	16						16
	135	**INSTRUCTIONAL FACILITATORS**	**38**	**10**	**3**			**4**	**55**
5100		Regular Instructions Services	22	10					32
5100		Regular Instructions Services	4						4
5200		Special Populations Services	7		2				9
5200		Special Populations Services	2						2
5200		Special Populations Services	3						3
5300		Alternative Programs and Services						4	4
6100		Support and Development Services			1				1
	142	**TEACHER ASSISTANT - NCLB**	**230**	**251**	**100**			**7**	**588**
5100		Regular Instructions Services	17	238					255
5200		Special Populations Services	178		75				253
5200		Special Populations Services	25		9				34
5200		Special Populations Services	2		1				3
5300		Alternative Programs and Services	6	13					19
5300		Alternative Programs and Services			8				8
5300		Alternative Programs and Services			7			7	14

PURPOSE / FUNCTION	OBJECT CODE	DESCRIPTION	STATE PUBLIC SCHOOL FUND	LOCAL CURRENT EXPENSE FUND	FEDERAL GRANT FUND	CHILD NUTRITION FUND	AFTER SCHOOL PROGRAM FUND	OTHER SPECIFIC REVENUE FUND	GRAND TOTAL
5800		School-Based Support Services	2						2
	143	**TUTOR**	**28**	**68**	**23**				**119**
5300		Alternative Programs and Services	28	68	23				119
	144	**INTERPRETER, BRAILLIST, TRANSL**	**6**		**3**			**5**	**14**
5200		Special Populations Services	6					2	8
5200		Special Populations Services						3	3
5300		Alternative Programs and Services			3				3
	145	**THERAPIST**	**23**	**5**					**28**
5800		School-Based Support Services	23	5					28
	146	**SPECIALIST (SCHOOL BASED)**	**32**	**10**	**11**			**2**	**55**
5200		Special Populations Services	1		1			1	3
5200		Special Populations Services	2						2
5200		Special Populations Services						1	1
5300		Alternative Programs and Services	27	1					28
5300		Alternative Programs and Services			4				4
5300		Alternative Programs and Services			1				1
5800		School-Based Support Services		1					1
5800		School-Based Support Services		1	1				2
5800		School-Based Support Services		6					6
5800		School-Based Support Services	2	1					3
5800		School-Based Support Services			4				4
	147	**MONITOR**	**63**	**1**					**64**
5800		School-Based Support Services		1					1
6500		Operational Support Services	63						63
	151	**OFFICE SUPPORT**	**23**	**180**	**3**	**5**	**3**		**214**
5400		School Leadership Services	9	44					53
5400		School Leadership Services	6	51					57
5800		School-Based Support Services	7	43					50
5800		School-Based Support Services		10					10
6100		Support and Development Services		10					10
6100		Support and Development Services	1						1
6200		Special Population Support and Development Services		1	3				4
6500		Operational Support Services		1					1
6600		Financial and Human Resource Services		11					11
6600		Financial and Human Resource Services		1					1
6800		System-Wide Pupil Support Services		1					1
6900		Policy, Leadership and Public Relations Services							
6900		Policy, Leadership and Public Relations Services		1					1
6900		Policy, Leadership and Public Relations Services		5					5
6900		Policy, Leadership and Public Relations Services		1					1
7100		Community Services					3		3
7200		Nutrition Services				5			5
	152	**TECHNICIAN**		**41**					**41**
5800		School-Based Support Services		1					1
6400		Technology Support Services		40					40
6700		Accountability Services							
	153	**ADMINISTRATIVE SPECIALIST**		**55**	**2**	**7**	**1**		**65**
5800		School-Based Support Services		12					12
6100		Support and Development Services		5					5
6100		Support and Development Services		1					1
6300		Alternative Programs and Services Support and Development Services			2				2
6500		Operational Support Services		1					1
6600		Financial and Human Resource Services		11					11
6600		Financial and Human Resource Services		2					2
6600		Financial and Human Resource Services		1					1
6600		Financial and Human Resource Services		12					12
6700		Accountability Services		1					1
6800		System-Wide Pupil Support Services		5					5
6900		Policy, Leadership and Public Relations Services		1					1
6900		Policy, Leadership and Public Relations Services		3					3
7100		Community Services					1		1
7200		Nutrition Services				7			7
	171	**DRIVER**	**231**	**5**					**236**
6500		Operational Support Services	231	5					236
	173	**CUSTODIAN**	**249**						**249**
6500		Operational Support Services	249						249
	174	**CAFETERIA WORKER**				**182**			**182**
7200		Nutrition Services				182			182
	175	**SKILLED TRADES**	**42**	**125**		**1**		**1**	**169**
6500		Operational Support Services	42	18					60
6500		Operational Support Services		107				1	108
7200		Nutrition Services				1			1
	176	**MANAGER**				**49**	**11**		**60**
7100		Community Services					11		11
7200		Nutrition Services				49			49
	178	**DAY CARE/BEFORE/AFTER SCH CARE**					**59**		**59**
7100		Community Services					59		59
		GRAND TOTAL BY FUND	**3623**	**914**	**228**	**245**	**74**	**45**	**5129**

Union County Public Schools
Enrollment
04/30/26

School Name	KG	1	2	3	4	5	6	7	8	9	10	11	12	13	Students
Antioch Elementary	109	112	123	147	156	148	0	0	0	0	0	0	0	0	795
Benton Heights Elementary School of the Arts	66	69	75	67	70	68	0	0	0	0	0	0	0	0	415
East Elementary	61	66	69	61	68	72	0	0	0	0	0	0	0	0	397
Fairview Elementary School	76	60	53	81	71	62	0	0	0	0	0	0	0	0	403
Hemby Bridge Elementary School	60	63	85	80	75	101	0	0	0	0	0	0	0	0	464
Indian Trail Elementary School	103	89	117	103	100	101	0	0	0	0	0	0	0	0	613
Kensington Elementary School	96	112	115	132	190	184	0	0	0	0	0	0	0	0	829
Marshville Elementary School	63	62	78	59	57	69	0	0	0	0	0	0	0	0	388
Marvin Elementary School	74	79	95	104	132	141	0	0	0	0	0	0	0	0	625
New Salem Elementary School	44	43	43	35	44	47	0	0	0	0	0	0	0	0	256
New Town Elementary	72	96	106	119	113	135	0	0	0	0	0	0	0	0	641
Poplin Elementary School	91	107	128	152	131	126	0	0	0	0	0	0	0	0	735
Porter Ridge Elementary School	104	106	118	112	144	129	0	0	0	0	0	0	0	0	713
Prospect Elementary School	69	76	60	63	57	63	0	0	0	0	0	0	0	0	388
Rea View Elementary	87	93	104	93	121	116	0	0	0	0	0	0	0	0	614
Rock Rest Elementary School	73	46	76	67	70	65	0	0	0	0	0	0	0	0	397
Rocky River Elementary	88	87	88	106	93	98	0	0	0	0	0	0	0	0	560
Sandy Ridge Elementary School	55	55	75	89	98	109	0	0	0	0	0	0	0	0	481
Sardis Elementary School	65	84	84	70	92	68	0	0	0	0	0	0	0	0	463
Shiloh Valley Elementary School	0	0	0	198	194	154	0	0	0	0	0	0	0	0	546
Shiloh Valley Primary School	160	150	188	0	0	0	0	0	0	0	0	0	0	0	498
Stallings Elementary School	124	122	121	139	148	131	0	0	0	0	0	0	0	0	785
Union Elementary School	53	42	51	38	42	60	0	0	0	0	0	0	0	0	286
Unionville Elementary School	95	92	118	112	135	98	0	0	0	0	0	0	0	0	650
Walter Bickett Elementary School	64	73	82	70	88	85	0	0	0	0	0	0	0	0	462
Waxhaw Elementary School	80	94	85	94	106	103	0	0	0	0	0	0	0	0	562
Weddington Elementary School	69	82	110	105	102	143	0	0	0	0	0	0	0	0	611
Wesley Chapel Elementary School	98	95	114	150	127	135	0	0	0	0	0	0	0	0	719
Western Union Elementary School	80	59	83	91	85	96	0	0	0	0	0	0	0	0	494
Wingate Elementary School	74	60	66	64	69	57	0	0	0	0	0	0	0	0	390
Elementary Total	**2353**	**2374**	**2710**	**2801**	**2978**	**2964**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**16180**
Cuthbertson Middle School	0	0	0	0	0	0	410	410	441	0	0	0	0	0	1261
East Union Middle School	0	0	0	0	0	0	210	213	243	0	0	0	0	0	666
Health Sciences Academy at Monroe Middle	0	0	0	0	0	0	233	252	282	0	0	0	0	0	767
Marvin Ridge Middle School	0	0	0	0	0	0	397	406	454	0	0	0	0	0	1257
Parkwood Middle School	0	0	0	0	0	0	252	303	283	0	0	0	0	0	838
Piedmont Middle School	0	0	0	0	0	0	306	291	289	0	0	0	0	0	886
Porter Ridge Middle School	0	0	0	0	0	0	486	517	471	0	0	0	0	0	1474
Sun Valley Middle School	0	0	0	0	0	0	324	303	308	0	0	0	0	0	935
Weddington Middle School	0	0	0	0	0	0	433	425	451	0	0	0	0	0	1309
Middle Total	**0**	**0**	**0**	**0**	**0**	**0**	**3051**	**3120**	**3222**	**0**	**0**	**0**	**0**	**0**	**9393**
Central Academy of Technology and Arts	0	0	0	0	0	0	0	0	0	219	227	222	221	0	889
Cuthbertson High School	0	0	0	0	0	0	0	0	0	462	433	428	440	0	1763
Forest Hills High School	0	0	0	0	0	0	0	0	0	256	224	242	140	0	862
Marvin Ridge High School	0	0	0	0	0	0	0	0	0	460	461	501	490	0	1912
Monroe High School	0	0	0	0	0	0	0	0	0	357	318	271	208	0	1154
Parkwood High School	0	0	0	0	0	0	0	0	15	275	275	265	209	0	1039
Piedmont High School	0	0	0	0	0	0	0	0	0	375	283	309	239	0	1206
Porter Ridge High School	0	0	0	0	0	0	0	0	0	507	440	379	404	0	1730
South Providence	0	0	0	0	0	0	11	18	28	37	14	7	2	0	117
Sun Valley High School	0	0	0	0	0	0	0	0	0	286	300	282	321	0	1189
Union County Early College	0	0	0	0	0	0	0	0	0	74	83	73	61	14	305
Weddington High School	0	0	0	0	0	0	0	0	0	474	505	474	421	0	1874
Wolfe School	0	0	0	0	0	0	9	7	6	12	7	14	53	0	108
High Total	**0**	**0**	**0**	**0**	**0**	**0**	**20**	**25**	**49**	**3794**	**3570**	**3467**	**3209**	**14**	**14148**

District Total **39721**

File #: 26-314 **Agenda Date:** 6/1/2026

TITLE:

Rezoning Petition CZ-2026-001 Marcham

INFORMATION CONTACT:

Bjorn Hansen, Planning Department, Senior Planner - Current Planning, 704-283-3690

ACTION REQUESTED:

Approve or deny rezoning petition

To ***approve*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) adopt the ordinance approving revision to the official zoning map of Union County, North Carolina, and (ii) adopt the consistency and reasonableness statement for approval.

To ***deny*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) deny rezoning petition CZ-2026-001 submitted by Tom Marcham; and (ii) adopt the consistency and reasonableness statement for denial.

PRIOR BOARD ACTION:

None.

BACKGROUND:

This case is requesting to rezone one parcel totaling 5 acres appearing on the tax map as tax parcel 09-414-019A along NC 75 from RA-40 to Light Industrial (LI) CZ with Amended Conditions in order to develop a landscaping supply business and limited construction equipment storage. The rezoning will include the following conditions:

1) Limited to approved site plan dated April 7, 2026
2) Uses limited to landscaping supply business and construction equipment storage
3) Five-year vesting of development rights
4) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval
5) Access may be restricted to right in right out in the future, at the discretion of the NCDOT, based on safety issues that may be created by this site

A community meeting was required and was held on March 30, 2026. A total of six residents attended the meeting and asked questions about fencing, lighting, traffic and stormwater impacts. No changes were made to the site plan as a result of the meeting.

The Land Use Board evaluated this proposal at its April 21, 2026 meeting and recommended approval on a 5-0 vote, citing consistency with the land use map.

A public hearing was conducted on May 18, 2026, and no one spoke for or against the rezoning.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

Union County
Planning Department
500 N Main Street - Suite 70
Monroe, NC 28112
T 704.283.3565
E UCPlanning@unioncountync.gov

General Information

Project Address 4521 waxhaw Hwy City Monroe State NC Zip 28112

Tax Parcel ID 09414019A Current Zoning Designation RA-40 Total Acres 5

Proposed Zoning Designation Light Industrial Date Submitted 1/12/2026

Contact Information

Applicant Name Tom marcham

Address 2904 McNeely Farms Dr City Wax Haw State NC Zip 28173

Phone 847-302-8577 Fax _____ Email [redacted]

Property Owner Name Tom Marcham

Address 2904 Mcneely Farms Dr City waxhaw State NC Zip 28173

Phone 847-302-8577 Fax _____ Email [redacted]

Applicant's Certification

Signature _____ Date 11/15/25 Printed Name/Title Tom Marcham

Owner's Certification (include names and signatures of all owners)

Signature _____ Date 11/15/25 Printed Name/Title Tom Marcham

Union County Office Use Only:

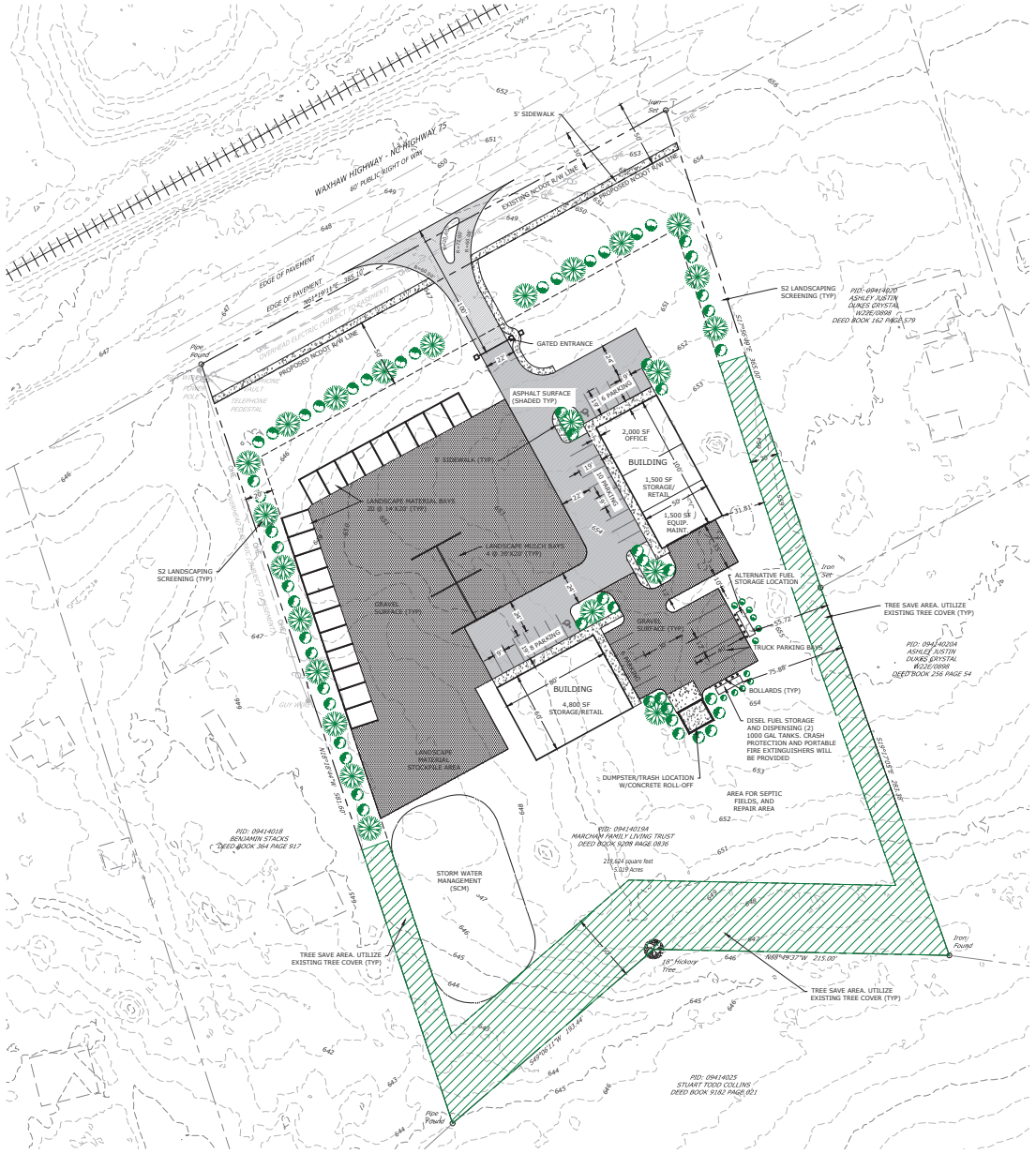
Case Number: 2026-CZ-001 Date Received: 1-12-26

Amount of Fee: $1000 Fee Ok: BCA Received by: BCA

Contact Bjorn Hansen to begin the process. T. 704.283.2690 E. Bjorn.hansen@unioncountync.gov

UNIONCOUNTY north carolina

***This document is only valid from July 1, 2025 - June 30, 2026


WAXHAW HIGHWAY - NC HIGHWAY 75
60' PUBLIC RIGHT OF WAY
5' SIDEWALK
EXISTING NCDOT R/W LINE
PROPOSED NCDOT R/W LINE
EDGE OF PAVEMENT
GATED ENTRANCE
ASPHALT SURFACE (SHADED TYP)
16 PARKING
2,000 SF OFFICE
BUILDING
1,500 SF STORAGE/ RETAIL
1,500 SF EQUIP. MAINT.
10 PARKING
8 PARKING
5' SIDEWALK (TYP)
LANDSCAPE MATERIAL BINS (6 @ 8'x8'x8' TYP.)
LANDSCAPE HEIGHT BARS (4 @ 30' BLD TYP.)
GRAVEL SURFACE (TYP)
S2 LANDSCAPING SCREENING (TYP)
ALTERNATIVE FUEL STORAGE LOCATION
TREE SAVE AREA. UTILIZE EXISTING TREE COVER (TYP)
TRUCK PARKING BAYS
BOLLARDS (TYP)
DISEL FUEL STORAGE AND DISPENSING (2) 1000 GAL TANKS. CRASH PROTECTION AND PORTABLE FIRE EXTINGUISHERS WILL BE PROVIDED
4,800 SF STORAGE/RETAIL
DUMPSTER/TRASH LOCATION W/CONCRETE ROLL-OFF
AREA FOR SEPTIC FIELDS, AND REPAIR AREA
STORM WATER MANAGEMENT (SCM)
PID: 09414018 BENJAMIN STACKS DEED BOOK 364 PAGE 917
PID: 09414019A MARCHAM FAMILY LIVING TRUST DEED BOOK 9208 PAGE 0836
215,624 square feet 5.019 Acres
PID: 09414020 ASHLEY JUSTIN DUKES CRYSTAL W/RE/08898 DEED BOOK 162 PAGE 579
PID: 09414024 ASHLEY JUSTIN DUKES CRYSTAL #5225/0898 DEED BOOK 256 PAGE 54
PID: 09414025 STUART TODD COLLINS DEED BOOK 9182 PAGE 021
18" Hickory Tree
Pipe Found
Iron Pipe
Iron Found
N88°49'27"W 215.00'
S09°08'11"W 1057.46'
S17°14'18"E 264.15'
N 17°14'18" W 264.15'
S 17°14'18" E 264.15'
N 88°49'27" W 215.00'
S 09°08'11" W 1057.46'
N 09°08'11" E 1057.46'
S 88°49'27" E 215.00

Dear Union County Zoning Department,

January 2, 2026

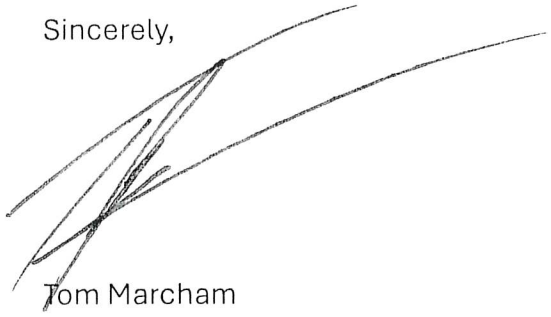
My name is Tom Marcham, I am writing to introduce myself. My son Stone and I own and operate Stone Pro Grading LLC. We are currently based in Waxhaw, North Carolina, and operate as a small grading and excavating company serving Union County and the greater Charlotte area.

We have recently purchased the property located at 4521 Waxhaw Highway, in unincorporated Union County with a Monroe mailing address. We are seeking to relocate our business operations to this site. In addition to headquartering Stone Pro Grading LLC, we are also proposing to open Stone Pro Material Sales. This business would operate as a wholesale and retail material yard offering mulch, stone, rock, sand, black soil, and other landscape materials to both contractors and the general public.

We believe this proposed use would be a good fit for the property and a beneficial addition to the surrounding area. This would not be a large-scale operation. The material yard would employ four to six people. It would be designed as a low-impact facility. We will make the property visually appealing through the use of a gated entrance, professional landscaping, and decorative berms.

Accordingly, we are requesting that the property be rezoned from Residential RA-40 to Light Industrial zoning to accommodate this proposed use.

Sincerely,



Tom Marcham

Stone Pro Grading LLC

From:	Marcham,Tom
To:	Bjorn Hansen
Cc:	Frank Cantrell; cduggan dugganlegal.com
Subject:	Stone Pro Material sales/4521 Waxhaw Hwy,
Date:	Friday, April 3, 2026 3:03:18 PM

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Bjorn,

We understand if we are approved for the requested zoning change to Light Industrial zoning at our property located at 4521 Waxhaw Hwy , Monroe NC we would have a 2 Year vesting period to start our project, however we are asking to have this extended to a 5-year vesting period . Thanks for your consideration, we look forward to working with you..

Thomas Marcham
General Manager
Mercedes Benz of South Charlotte
704-889-4444
Tmarcham@penskeautomotive.com



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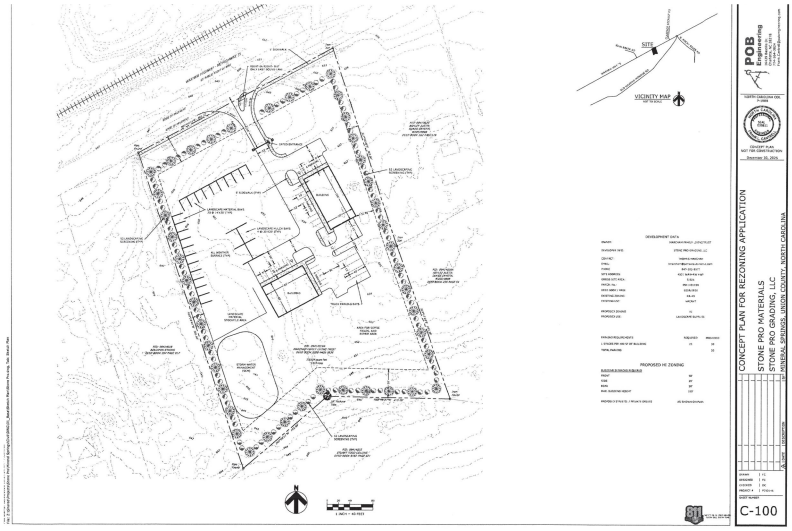
Penske Automotive Group
E-Commerce Department
2555 Telegraph Road, Bloomfield Hills, MI 48302.

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Morrison Appraisal, Inc.

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Impact Study
4521 Waxhaw Highway
Parcel ID: 09414019A
Monroe, North Carolina



As of
February 9, 2026

Prepared For
Chris Duggan
The Duggan Law Firm, PC
101 S. Main Street
Monroe, NC 28112

Prepared by
MORRISON APPRAISAL, INC
Andrew Morrison, MAI, CCIM,
North Carolina Certified General-A7253

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March 25, 2026

Christopher Duggan, Esq.
The Duggan Law Firm, PC
101 S. Main Street
Monroe, NC 28112

Re: Impact Study
4521 Waxhaw Highway
Parcel ID: 09414019A
Monroe, North Carolina

Dear Mr. Duggan:

At your request, I have completed an impact study concerning the proposed conditional rezoning of the above-referenced property, which includes a request to rezone the property from RA-40 (Residential Agricultural) to Light Industrial, along with a Special Use Permit to allow for outdoor storage. This analysis was conducted to assist in evaluating whether the proposed rezoning is expected to substantially injure the value of abutting properties.

The subject property consists of approximately 5.00 acres located along Waxhaw Highway in Union County, North Carolina. The property is currently vacant and situated within a predominantly rural area characterized by a mix of residential, agricultural, and infrastructure-related land uses.

The scope of this assignment included an analysis of market data, comparable property conditions, and case studies involving residential properties located in proximity to light industrial and contractor-oriented uses. The purpose of this analysis was to determine whether the proposed use would be expected to result in a measurable and material reduction in the value or marketability of surrounding residential properties.

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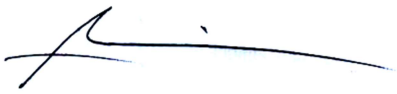
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Based on the analysis contained within the accompanying report, it is my opinion that the proposed rezoning and associated site plan are not expected to result in a measurable or consistent reduction in the value of surrounding properties. Accordingly, the available market evidence does not support a conclusion that the proposed use would substantially injure the value of abutting properties.

This analysis has been prepared in accordance with the Uniform Standards of Professional Appraisal Practice (USPAP) and is subject to the assumptions and limiting conditions contained within the report.

Thank you for the opportunity to be of service. Please feel free to contact me with any questions or if additional analysis is required.

Andrew G. Morrison, MAI, CCIM









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Subject Property – 4521 Waxhaw Highway

All photographs were taken at the time of inspection and are representative of site conditions.



Site Frontage along Waxhaw Highway



Highway View – Westbound Direction



Interior of Site – North View



Rear of Site – South View



View from Rear Toward Waxhaw Highway



Adjoining Property – West Boundary

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IMPORTANT FACTS AND CONCLUSIONS

Property Location	4521 Waxhaw Highway, Union County, NC
Parcel ID	09414019A
Property Owner	Marcham Family Living Trust
Study Requested By	Christopher Duggan, Esq., The Duggan Law Firm, PC
Intended Use	To assist the client in evaluating the potential impact of a proposed rezoning on surrounding properties
Intended User	Christopher Duggan and associated parties involved in the rezoning process
Date of Study	March 9, 2026
Property Rights Considered	Fee Simple
Current Zoning	RA-40 (Residential Agricultural)
Proposed Zoning	Light Industrial (Conditional Rezoning) with Special Use Permit for outdoor storage
Site Area	Approximately 5.00 acres
Current Use	Vacant land
Proposed Use	Light industrial use with associated outdoor storage, as depicted in the submitted site plan
Scope of Analysis	Analysis of market data, comparable property conditions, and case studies to evaluate whether the proposed use is expected to result in a measurable and material impact on surrounding property values
Extraordinary Assumptions	The proposed development will be constructed in substantial accordance with the submitted site plan
Hypothetical Conditions	None
Conclusion	Based on observed market behavior and analysis of comparable conditions, the proposed rezoning and associated use are not expected to result in a measurable or consistent reduction in the value or marketability of surrounding properties, and therefore are not expected to substantially injure the value of abutting properties

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PURPOSE AND SCOPE OF WORK

Purpose of the Study

The purpose of this analysis is to evaluate whether the proposed conditional rezoning of the subject property, including a Light Industrial classification and associated Special Use Permit for outdoor storage, is likely to result in a measurable and material reduction in the value or marketability of surrounding residential properties.

This study is specifically intended to assist the client in determining whether the proposed use would be expected to "substantially injure" the value of abutting properties, as required in the rezoning review process.

Intended Use and Intended User

The intended use of this report is to provide market-based analysis and support for consideration in the rezoning process.

The intended user of this report is Christopher Duggan, Esq., and associated parties involved in the evaluation of the proposed rezoning. No other use or user is intended or authorized.

Scope of Work

The scope of work for this assignment included the collection, analysis, and interpretation of market data relevant to residential properties located in proximity to light industrial, contractor-oriented, or similar non-residential uses.

The analysis included a review of comparable market conditions, transaction data, and case study examples in which residential properties are situated near similar uses. Key indicators considered include sale price, price relationships, and general marketability characteristics, including relative positioning within the market and exposure time.

In addition, the subject property and surrounding area were analyzed with respect to land use patterns, site characteristics, and the proposed development layout, including buffering, access, and overall site design as depicted in the submitted site plan.

This assignment does not include the development of an opinion of market value for the subject property or any surrounding properties. Rather, the analysis is limited to evaluating whether a measurable and consistent pattern of impact is evident in the marketplace.

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Nature of the Assignment

This study is an analysis of market behavior and is not intended to be an appraisal, appraisal review, or appraisal consulting assignment as defined by the Uniform Standards of Professional Appraisal Practice (USPAP). No opinion of market value is developed as part of this assignment.

The conclusions presented herein are based on observed market data and are intended to reflect the behavior of typical market participants under similar conditions.

Assumptions and Limiting Conditions

This analysis assumes that the proposed development will be constructed in substantial accordance with the submitted site plan and applicable zoning conditions.

The analysis is based on information available as of the date of this report and assumes that no significant changes in market conditions or regulatory requirements occur that would materially alter the conclusions

PROPERTY DESCRIPTION AND SITE CONTEXT

Property Description

The subject property is located at 4521 Waxhaw Highway in Union County, North Carolina, and is identified as Parcel ID 09414019A. The site consists of approximately 5.00 acres and is currently vacant, with a prior residential improvement having been removed.

The property is generally rectangular in shape and features frontage along Waxhaw Highway, a primary transportation corridor within the area. Based on site inspection and available mapping, the topography appears generally level to gently sloping and suitable for development. The site is primarily wooded, with natural vegetation providing existing screening along portions of the perimeter.

Access to the property is proposed via Waxhaw Highway. According to the client's conversations with NCDOT and minimal traffic impacts, NCDOT is not requiring a left turn lane into property.

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Subject Property Summary

Attribute	Description
Location	4521 Waxhaw Highway, Union County, NC
Parcel ID	09414019A
Site Area	±5.00 acres
Current Use	Vacant land
Prior Use	Residential (demolished)
Current Zoning	RA-40 (Residential Agricultural)
Proposed Zoning	Light Industrial (Conditional)
Proposed Use	Light industrial with outdoor storage
Access	Waxhaw Highway
Topography	Generally level to gently sloping
Vegetation	Primarily wooded with natural buffering

Proposed Development

The proposed development consists of a light industrial use with associated outdoor storage areas, subject to conditional rezoning and a Special Use Permit.

Based on the conceptual site plan provided, the development is designed with a centrally located building footprint, surrounded by internal circulation and designated parking areas. Outdoor storage areas appear to be located within the interior of the site and are not positioned directly along the roadway frontage.

The plan indicates the use of perimeter buffering, including landscaped and wooded areas, intended to provide visual screening from adjoining properties. The overall layout reflects an effort to internalize operational components and minimize external visibility.

While the conceptual plan is preliminary in nature, it provides sufficient detail to evaluate the general layout, access, and relationship of the proposed use to surrounding properties.

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Proposed Development Overview

Feature	Description	Impact Relevance
Building Location	Centrally located on site	Reduces edge impact
Outdoor Storage	Located within interior of site	Limits visibility
Buffering	Perimeter landscaping and wooded areas	Provides visual screening
Access Design	Controlled ingress/egress	Minimizes traffic disruption
Site Size	5.00 acres	Allows separation from neighbors

Site and Locational Characteristics

The subject's location along Waxhaw Highway provides both visibility and accessibility, which are characteristics commonly associated with a range of land uses beyond strictly residential development.

The size of the parcel, combined with existing vegetation and the proposed buffering shown on the site plan, allows for separation between the proposed use and adjoining properties. This separation is an important consideration in evaluating potential external impacts.

Overall, the subject property is not located within a densely developed residential subdivision, but rather within a broader rural setting where a variety of land uses coexist.

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ZONING AND FUTURE LAND USE

Current Zoning

The subject property is currently zoned RA-40 (Residential Agricultural) by Union County.

This zoning classification is intended to support low-density residential development and agricultural uses, generally characterized by large lot sizes and rural land use patterns. While certain limited non-residential uses may be permitted within this district, light industrial uses and outdoor storage are not permitted by right and require rezoning and/or special approval.

As such, the proposed use cannot be developed under the current zoning designation.

Proposed Zoning

The proposed rezoning seeks to reclassify the subject property to a Light Industrial designation, along with a Special Use Permit to allow for outdoor storage.

The proposed use consists of a light industrial operation with associated outdoor storage areas, as depicted in the submitted conceptual site plan. This type of use is more intensive than those permitted under the current RA-40 zoning and therefore requires discretionary approval through the rezoning process.

Comprehensive Plan and Land Use Guidance

Union County has adopted long-range planning documents, including the Union County 2050 Comprehensive Plan and the Rural Land Use Plan, which provide guidance on future land use patterns and development policies.

The 2050 Comprehensive Plan identifies the importance of coordinating land use patterns with infrastructure and transportation corridors, noting that development along major roadways often reflects a broader range of uses and intensities .

Additionally, the Rural Land Use Plan emphasizes the preservation of rural character while recognizing ongoing development pressures and the need for flexibility in land use decisions .

These planning documents acknowledge that rural areas are subject to change over time, particularly along transportation corridors where access and visibility support a variety of land uses.

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Land Use Context and Compatibility

The subject property is located along Waxhaw Highway, a primary transportation corridor that introduces influences beyond purely residential use.

As illustrated in the accompanying exhibits, the surrounding area is characterized by a mix of:

- Low-density residential uses
- Agricultural and vacant land
- Existing infrastructure, including a railroad corridor

This pattern is consistent with a transitional rural corridor environment, where a range of land uses may coexist.

The Union County 2050 Plan specifically recognizes that land use maps provide general guidance and cannot fully capture site-specific conditions such as buffering, infrastructure, and design elements that influence compatibility .

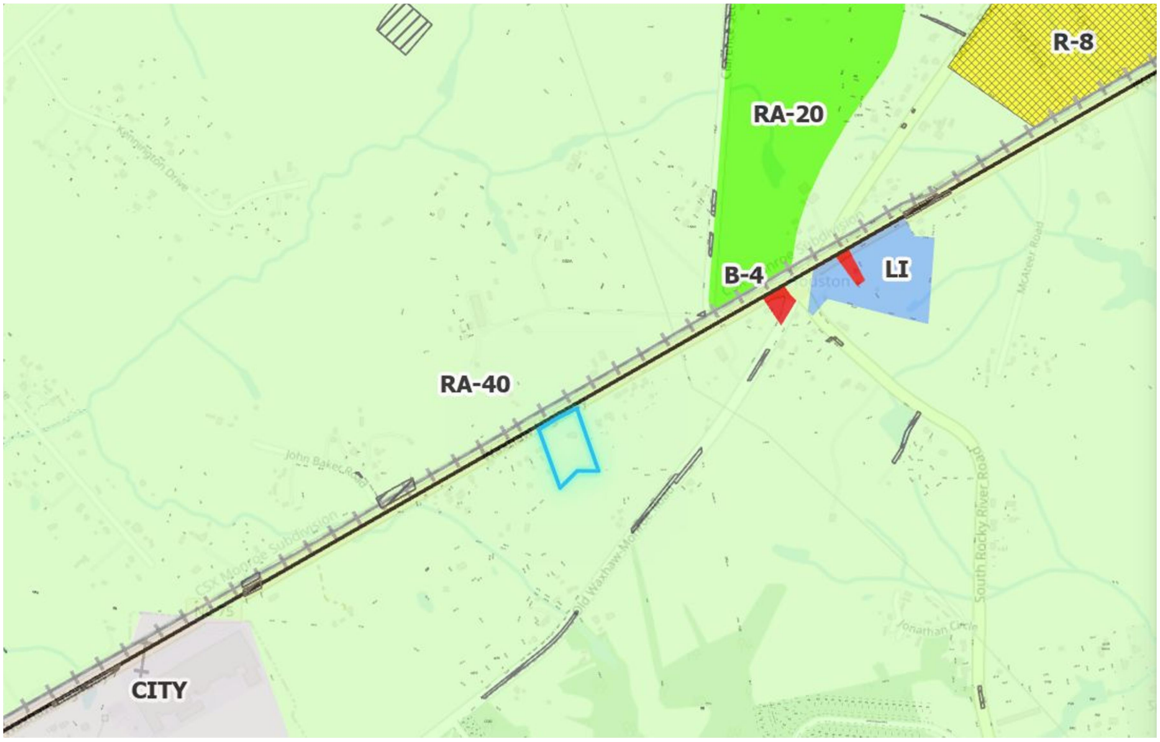
Accordingly, compatibility is evaluated not only based on zoning classifications, but also on site design, buffering, and observed market behavior.

Zoning Summary

Category	Description
Current Zoning	RA-40 (Residential Agricultural)
Permitted Uses	Low-density residential and agricultural uses
Proposed Zoning	Light Industrial (Conditional)
Proposed Use	Light industrial with outdoor storage
Rezoning Requirement	Required to allow proposed use
Planning Context	Transitional rural corridor with mixed land use influences

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ZONING MAP



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SURROUNDING PROPERTIES



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Parcel ID	Location	Current Use	Land Use	Comments
09414020	Adjacent East	Single-Family Residence	SFR	Improved residential parcel with typical rural homesite characteristics
09414021	Northeast	Single-Family Residence	SFR	Similar residential use with accessory structures observed
09414022 / 09414022A	Northeast Cluster	Single-Family Residences	SFR	Clustered residential development along Waxhaw Highway corridor
09414016	Southwest	Single-Family Residence	SFR	Rural residential parcel with spacing consistent with area
09414015	South	Single-Family Residence	SFR	Larger residential tract with lower density characteristics
09414025	South (Rear)	Agricultural / Vacant	AG	Open land with no significant improvements observed
09411001	North (Across Hwy)	Agricultural / Residential Mix	AG / SFR	Larger tract with residential improvements and open land areas
—	Across Waxhaw Hwy	Railroad Corridor	Infrastructure	Established rail line representing existing non-residential influence
—	Waxhaw Highway	Arterial Roadway	Infrastructure	Primary transportation corridor influencing surrounding land use patterns

The subject property is located within a rural corridor characterized by a mix of residential, agricultural, and infrastructure-related land uses.

Surrounding properties consist primarily of single-family residential dwellings situated on larger lots, interspersed with vacant and agricultural tracts. Development density is relatively low, with significant spacing between improvements.

In addition to residential and agricultural uses, the surrounding area is influenced by existing infrastructure elements, including Waxhaw Highway and a railroad corridor located across the roadway from the subject. These features contribute to a broader land use pattern that is not exclusively residential in nature.

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The presence of these elements, along with the size and configuration of surrounding parcels, reflects a transitional land use environment typical of rural areas experiencing gradual change along transportation corridors.

Surrounding Properties and Area Characteristics

Photographs illustrate surrounding land use patterns and nearby property characteristics.



Adjacent Residential Property – East



Adjacent Residential Property – Rear



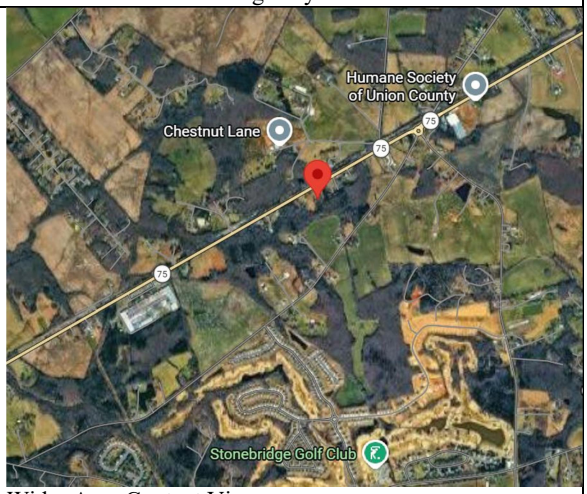
Nearby Properties along Waxhaw Highway



View Across Waxhaw Highway



Railroad Influence across Waxhaw Highway



Wider Area Context View

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Market Evidence and Case Study Analysis

Impact Considerations Summary

Factor	Observation	Market Impact
Traffic	Controlled access design	Not expected to materially affect surrounding properties
Noise	Typical of light industrial use	Consistent with corridor influences
Visual Impact	Buffering and internalized layout	Limited visibility from adjacent properties
Compatibility	Mixed-use rural corridor	Consistent with surrounding land use pattern

Introduction

An important component of evaluating potential impact is the analysis of actual market behavior in similar settings. Rather than relying on theoretical assumptions regarding buyer preferences, this analysis considers how residential properties have performed when located in proximity to light industrial, contractor-oriented, or similar non-residential uses.

The following case studies were selected to evaluate whether measurable or consistent patterns of value diminution are observed in the marketplace. These case studies include both subdivision environments, where direct comparison between exposed and non-exposed properties is possible, and rural residential settings, where buyers evaluate properties across a broader competitive area.

The analysis focuses on identifying whether proximity to such uses results in measurable price differences, extended marketing times, or other indicators of reduced marketability. The objective is not to determine whether preferences may exist, but whether those preferences are reflected in observable and consistent market outcomes.

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Case Study 1

Harkey Creek Subdivision – Monroe, Union County, North Carolina

Harkey Creek is a residential subdivision developed beginning in approximately 2020–2021, consisting of both attached townhome product and detached single-family homes. Portions of the subdivision, particularly along Kristy Lynn Drive and Rowan Lane, are located in proximity to existing contractor-oriented and light industrial uses.

The subdivision represents a transitional environment in which residential development interfaces with established non-residential uses. Within the subdivision, homes vary in degree of exposure, allowing for direct comparison between properties with differing proximity to these uses.

Subset A – Kristy Lynn Drive (Townhomes)

Sales Summary

Category	Count	Avg $/SF	Median $/SF
Kristy Lynn Drive (All Sales)	28	$152.77	$152.55
Non-Kristy Lynn (Subdivision)	23	$143.98	$140.44

Paired Sales Comparison

Unit Type	Exposed Range $/SF	Non-Exposed Range $/SF
1,773 SF	$162 – $169	$149 – $155
1,915 SF	$153 – $157	$145 – $152

Analysis

Within Kristy Lynn Drive, homes with the greatest proximity to adjacent non-residential uses do not exhibit a consistent pricing disadvantage. Paired comparisons of similar unit types indicate that more exposed units frequently achieved pricing equal to or exceeding that of less-exposed units.

While overall pricing differences between Kristy Lynn and other subdivision townhomes are influenced by timing of construction and market appreciation during 2021, direct comparisons within the same street do not demonstrate a consistent pattern of diminished value attributable to proximity.

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Subset B – Rowan Lane (Single-Family)

Sales Summary

Metric	Value
Total Sales	22
Avg $/SF	$161.04
Median $/SF	$158.80
Range	$125 – $210

Resale Indicators

Address	Year	$/SF	DOM
1304 Rowan Ln	2024	$182.24	18
1311 Rowan Ln	2025	$171.82	42
1356 Rowan Ln	2024	$181.09	107

Broader Subdivision Context

Metric	Value
Total SFR Sales	105
Avg $/SF	$181.79
Median $/SF	$176.12

Analysis

The Rowan Lane sales, including both initial construction and subsequent resales, do not exhibit a pattern of reduced pricing or inferior performance relative to other homes within the subdivision. Resale transactions occurring after full build-out, when buyers had complete awareness of surrounding land uses, achieved pricing levels consistent with or exceeding earlier sales.

There is no observable clustering of lower sale prices for homes in closer proximity to adjacent uses, nor is there evidence of prolonged marketing periods or reduced buyer demand. When considered within the broader subdivision context, Rowan Lane properties are competitive within overall neighborhood pricing trends and do not occupy a distinct low-value segment.

Conclusion – Case Study 1

Within the Harkey Creek subdivision, including both townhome and single-family product types, the market does not demonstrate a measurable or consistent reduction in value for properties located in proximity to adjacent light industrial or contractor-oriented uses. This conclusion is supported by both initial construction sales and subsequent resale activity, as well as direct comparison of more exposed and less exposed properties within the same subdivision.

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morrisonappraisal@carolina.rr.com

Case Study 2

9414 Machado Drive – Indian Trail, Union County, North Carolina

The subject property is located in a rural residential setting characterized by scattered single-family homes on one- to three-acre tracts across the Indian Trail, Fairview, and Unionville areas. In this market segment, buyers typically evaluate properties across a broader geographic area rather than within a single neighborhood.

The subject is located within the Piedmont school district, which is generally competitive with nearby Sun Valley and Porter Ridge districts. One comparable is located in the Weddington school district, which is typically considered superior and often commands a pricing premium.

Transaction Summary

Metric	Value
Sale Price	$650,000
Price per SF	$281
Living Area	2,312 SF
Site Size	1.40 Acres
Year Built	1992
Days on Market	48

Competitive Sales

Address	Sale Price	$/SF	DOM
9414 Machado Dr	$650,000	$281	48
4516 Stryker Dr	$680,000	$295	3
3324 McLendon Rd	$543,000	$254	40
825 Fisher Ridge Rd	$425,000	$211	12
7702 Surry Ln	$399,000	$199	4

Analysis

The subject property achieved pricing toward the upper end of the competitive range and does not reflect a discounted position relative to comparable rural residential properties. The highest-priced comparable is located in the Weddington , which generally has higher home values; however, the subject's pricing remains competitive within the dataset.

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The marketing period is within a typical range for rural residential properties and does not indicate diminished buyer interest. The level of renovation and condition observed at the subject is consistent with market-supported investment and does not indicate a location that is functionally impaired or avoided by buyers.

Conclusion – Case Study 2

The sale of 9414 Machado Drive does not demonstrate a measurable or consistent reduction in value attributable to its proximity to a contractor-oriented use. Within the broader rural residential market, the subject's pricing and market performance are consistent with similar properties and do not indicate a systematic discount associated with such proximity.

Observed Market Patterns

Across both case studies, the analysis does not identify a consistent or measurable pattern of value diminution associated with proximity to light industrial or contractor-oriented uses. In a subdivision environment where direct comparison is possible, exposed and non-exposed properties perform similarly. In a broader rural market where buyers have multiple location options, properties in proximity to such uses remain competitive and do not exhibit pricing or marketability penalties.

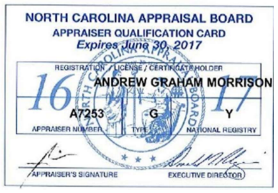
These findings indicate that while individual buyer preferences may vary, the market does not consistently translate those preferences into measurable differences in value.

Summary Conclusion

Based on the analysis of the case studies presented, the market does not demonstrate measurable or consistent evidence that proximity to light industrial or contractor-oriented uses results in a reduction in residential property values. The observed data does not support a pattern of diminished pricing or marketability attributable to such proximity.

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Andrew (Andy) Morrison, MAI, CCIM
613 Euclid Street
Monroe, NC 28110



NC Certified General #A7253
Member of the Appraisal Institute #497226

MAI Designated
CCIM Designated Member

EDUCATION

BS Degree – Appalachian State University
Political Science- Pre-Profession Legal Studies
Business Minor- December 2004

APPRAISAL COURSES ATTENDED AND PASSED WITH EXAM

R1 – Introduction to Real Estate Appraisal
Mingle Institute, Charlotte, NC- February 2005

R2 – Valuation Principles and Procedures
Mingle Institute, Charlotte, NC- April 2005

R3- Applied Residential Property Valuation
Mingle Institute, Charlotte, NC- May 2005

USPAP- Mingle Institute, Charlotte, NC- June 2005

G1- Introduction to Income Property Appraisal
Mingle Institute, Charlotte, NC- September 2005

G2- Advanced Income Capitalization Procedures
Mingle Institute, Charlotte, NC- October 2005

G3- Applied Income Property Valuation
Mingle Institute, Charlotte, NC- November 2005

Basic Income Capitalization
The Appraisal Institute, Greensboro, NC- May 2007

USPAP Update- Mingle Institute, Charlotte, NC- May 2007

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Business Practices and Ethics-
The Appraisal Institute, Greensboro, NC- December 2007, Columbia, SC- May 2012
North Carolina General Certified Appraiser State Examination-
Passed December 2007

Report Writing and Valuation Analysis-
The Appraisal Institute, Greensboro, NC- July 2008

Advanced Income Capitalization-
The Appraisal Institute, Greensboro, NC- June 2009

USPAP Update- Mingle Institute, Charlotte, NC- July 2009

Market Analysis and Highest and Best Use-
The Appraisal Institute, Greensboro, NC- July 2009

Advanced Sales Comparison and Cost Approaches
The Appraisal Institute, Greensboro, NC- June 2010

Advanced Applications
The Appraisal Institute, Greensboro, NC- February 2011

Appraisal Institute Comprehensive Examination for the MAI Designation
Passed November 2011

USPAP Update- Erick Little & Company, Charlotte, NC- April 2012, April 2014

SEMINARS

Residential Development- Valuation Trends, Issues, and Challenges
Online- October 2009

Using Spreadsheet Programs in Real Estate Appraisals
The Appraisal Institute, Greensboro, NC- February 2010

The Appraiser and the Site To Do Business: Location, Timing and Demographics
Online-August 2010

Understanding and Using Investor Surveys Effectively
Online- January 2011

Perspectives from Commercial Review Appraisers
Online- July 2011

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The Green Guide to Appraising
McKissock- May 2013

Deriving and Supporting Adjustments
McKissock- May 2013

Evaluation Appraisal Seminar
The NC Chapter of the Appraisal Institute, Oct 2014

Rural Land Valuation
The Appraisal Institute- January 2017

Supervisor/Trainee Course
CPCC- Harris Campus- April 2017

CCIM- CI101: Financial Analysis for Commercial Real Estate
Charlotte, NC- February 2018

CCIM- CI104: Investment Analysis for Commercial Real Estate
Charlotte, NC - March 2019

CCIM- Commercial Real Estate Negotiations
Charlotte, NC- May 2019

CCIM- User Decision Analysis For Commercial Real Estate
Charlotte, NC – October 2019

CCIM Comprehensive Examination for the CCIM Designation
Passed August 2020

March 25, 2026
Stone Pro Material Sales
Rezoning Request (PIN 09414019A)

Bjorn E. Hansen, AICP CTP, CZO
Senior Planner
Union County, NC

Mr. Hansen
Thank you for your correspondence and consideration. We are excited to bring this low impact commercial operation to Union County. As discussed in our letter of intent, the property we wish to rezone is located at 4521 Waxhaw Hwy, in unincorporated Union County. This low impact commercial development will offer wholesale and retail landscaping material offering mulch, stone, rock, sand, black soil and other landscape materials to both contractors and the general public.

We anticipate that the hours of operation will be from 7am-5pm Monday through Friday and 7am-3pm on Saturdays. The facility will be closed on Sundays. With the conversations had with NCDOT, the facility will be accessed by a right in/right out, for all vehicle traffic traveling east on Waxhaw Hwy and a left in for those customers traveling west on Waxhaw Hwy. Waxhaw Hwy is a primary road running from Monroe to the South Carolina line. At the entrance to our site the road is level and straight there will not be an issue with sight lines for departing and entering traffic.

The site will be served with County water and will have onsite septic. We don't anticipate much use of the septic facilities as we only expect to have at most 4-6 employees during peak hours. Electric will be provided by the local electric provider. Garbage service will be contracted with a waste removal company for the low impact development through onsite dumpster. While there will be a gate at the site for security during hours when the operation is closed, the same will be designed with either a lock box for fire or emergency services or a Yelp system.

The site is designed to have a stormwater retention pond to ensure control of stormwater management and water quality. All storm water and surface water will be directed to the onsite storm water management pond. No erosion or sedimentation leaving site is anticipated. Erosion and Sediment controls will be used during construction.

It is anticipated that the site will be in harmony with neighboring uses as described in our Impact Study commissioned and provided to the County. The site will have restricted access during hours when the site is closed and as such limited security lighting is anticipated for the site. In addition, significant screening will be provided around the property to include S2 Screening as well as natural buffers to allow for screening for our adjacent neighbors. The intended use will be in harmony with the adjacent land uses to include the railroad corridor, surrounding agricultural uses and surrounding residential uses.

The following outlines and answers 80.110-H Findings and Conclusions Required for Approval.

1. The proposed use for this development will comply with all regulations and standards generally applicable within the zoning district LI CZ and specifically applicable to the particular type of special use.
   The proposed use is Light Industrial with outdoor storage of landscaping materials,

office space and indoor storage. This use will comply with all regulations and standards applicable to the LI CZ zoning district.

2. The Proposed development will not materially endanger the public health or safety. Considerations:
   a. Traffic conditions in the vicinity, including the effect of additional traffic on streets and street intersections, sight lines at street intersections and curb cuts;
   Using the ITE Trip Generation Rates for General Light Industrial 110 per disturbed acre the expected AM hour Trips would be 26, the PM hour would be 25 showing a minimal amount of additional traffic. Waxhaw Highway is straight and level through this area so sight lines will not be an issue. We will coordinate with Union County and NCDOT though the design phases for the intersection and driveway permits.
   b. Provisions of services and utilities, including water, sewer, electrical, garbage collections and fire protection.
   It is anticipated that water will be supplied by Union County Public Works, Sewer will be on site septic. Preliminary soils studies have been performed and will support the septic system. Electric will be provided by the local electricity company. Garbage collection will be contracted through a private provider with an onsite dumpster. Fire protection will be provided by the Mineral Springs Fire Department.
   c. Soil erosion and sedimentation; and
   Soil and Erosion Control permits will be obtained prior to starting any onsite construction and will be maintained throughout construction.
   d. Protection of public, community, or private water supplies, including possible adverse effects on surface waters or groundwater.
   All county and state regulations will be met or exceeded for construction and separation for the septic systems, the temporary sediment control basins and the permanent stormwater control measures.
3. The proposed development will not substantially injure the value of abutting property, or is a public necessity. Considerations:
   a. The relationship of the proposed use and the character of development to surrounding uses and development, including possible conflicts between them and how these conflicts will be resolved; and
   The property is currently vacant and situated within a predominantly rural area characterized by a mix of residential, agricultural, and infrastructure-related land uses. This site will be providing a buffer of S2 landscaping and utilizing the existing tree coverage to alleviate possible conflicts.
   b. Whether the proposed development is so necessary to the public health, safety, and general welfare of the county as a whole as to justify it regardless of its impact on the value of abutting property.
   This development will provide to the surrounding area landscaping supplies that contractors will utilize in the local area and be convenient to the local do it yourself yard and lawn care folks.
4. The proposed development will be in harmony with the area in which it is located. Considerations:
   a. The relationship of the proposed use and the character of development to surrounding uses and development, including possible conflicts between them and how these conflicts will be resolved or mitigated
   The property is currently vacant and situated within a predominantly rural area

characterized by a mix of residential, agricultural, and infrastructure-related land uses. This site will be providing a buffer of S2 landscaping and utilizing the existing tree coverage to alleviate possible conflicts.

5. The proposed development will be in general conformity with the comprehensive plan.
   Looking at the Union County 2050 Land Use Map, this site would fall in the Waxhaw Highway (Highway 75) Employment Corridor.

   The subject property is located within a rural corridor characterized by a mix of residential, agricultural, and infrastructure-related land uses.
   Surrounding properties consist primarily of single-family residential dwellings situated on larger lots, interspersed with vacant and agricultural tracts. Development density is relatively low, with significant spacing between improvements.
   In addition to residential and agricultural uses, the surrounding area is influenced by existing infrastructure elements, including Waxhaw Highway and a railroad corridor located across the roadway from the subject. These features contribute to a broader land use pattern that is not exclusively residential in nature.
   The presence of these elements, along with the size and configuration of surrounding parcels, reflects a transitional land use environment typical of rural areas experiencing gradual change along transportation corridors.

We are very excited to work with Union County in developing our project. Please email or call me with any questions or concerns that have not been addressed.

Sincerely,

Thomas Marcham
847-302-8577

THE DUGGAN LAW FIRM

PO Box 481
Monroe, NC 28111
Telephone (704) 776-9610
cduggan@dugganlegal.com

Christopher M. Duggan, Esq.
Licensed in North Carolina
and New York

April 6, 2026

Via Email bjorn.hansen@unioncountync.gov
Bjorn Hansen
Union County Planning Department
500 N. Main Street
Monroe, NC 28112

Re: Stone Pro Materials 4521 Waxhaw Highway Parcel ID: 09414019A

Dear Mr. Hansen

As you know a community meeting was held on March 30, 2026 at 6:00pm at the Mineral Springs Voluntary Fire department for the zoning change at the above referenced property from residential to light industrial. I am attaching a copy of the sign-up sheet for the meeting wherein six (6) residents appeared for the meeting. Also in attendance was Bjorn Hansen and John Wehr from Union County, the undersigned, the applicant representatives Tom Marcham and Stone Marcham, and Frank Cantrell, the engineer on the project.

The meeting was opened by the undersigned to provide a summary of the zoning change request and the intended use at the property. Mr. Tom Marcham addressed the residents to discuss the intended use of the property. Mr. Marcham advised the residents that the intended use was for landscaping supply material such as mulch, stone and black dirt bulk and retail sales. In addition, the applicant intends to have space available for the storage of landscaping equipment. The applicant advised the residents that the use did not contemplate any grinding or general dumping of material, other than material delivery. This representation was welcomed news to the residents as there was a concern that there would be grinding of material on the property. A question was raised as to why the applicant did not purchase a property already zoned light industrial. The applicant advised that there was not property that would fit the desired use but that the subject property was in the anticipated employment corridor of the County Land Use Plan.

One resident inquired as to whether the property would be fenced along the parameter of the property. The applicant advised that, along with the required S2 screening that will be along the property, the property would indeed be fenced along the parameter. Questions were also raised regarding dust generated from the property. The applicant advised that the retail and parking area would be paved and the area where the bulk material will be stored will have stone surface but that they will have a water truck present to make sure that the amount of dust generated from the machines would be limited. There was also a concern raised about hours of operation and lighting. The applicant advised that the intended hours of operation would be Monday-Friday 7:30am to 5:00pm and Saturday from 7:30am to 1:00pm or potentially open later based upon market conditions. Sunday open to public based upon market conditions. In all cases 5:00pm will be the latest time to be open. Regarding the lighting, there would be some security lights on the property/building that would be down

facing and motion activated. The height of the stand-alone lights is anticipated to be approximately 10'-12'. However, because the property will be secured by a gate, it is anticipated that the amount of security lighting will be limited. Residents were advised that a photometric study will be required by the County. Questions were raised about water runoff and the engineer on the project advised the residents regarding the anticipated dry retention pond will be installed to limit the amount of water runoff from the site. The residents were informed that the site will be serviced by County water and onsite septic, which will be maintained. Finally, the residents were informed that the access to the property will be right in and right out, with a left turn available for traffic traveling west on Hwy 75.

The general overall sentiment of the residents in attendance was positive. They represented that the intended use would have a low impact on the neighboring properties and the intended use would be preferable to a more intense commercial use or a housing development. The comment was made that the County needs more low impact commercial uses similar to the use proposed by the applicant. The residents therefore seemed to approval of the zoning change as represented by the applicant.

While approval would come with a 2-year vesting period, the applicant also requests the additional five 5 years for vesting.

Should you have any questions, please do not hesitate to contact me.

Very truly yours,

Christopher M. Duggan, Esq.

CMD:st
Enc.

Stone Pro Material Sales
Community Meeting
March 30, 2026

Sign-in Sheet

Print Name	Address	E-mail
Frank Cantrell		Frank@pdoengineering.com
Judy Simpson	4420 Old Waxhaw Monroe Rd.	
DAVID B. CONLEY	1518 CLARENCE SECREST RD MONROE, NC 28110	DAVIS@HARTWICK.EDU
Erich D. Helms	3.27 acres Old Waxhaw Monroe Rd.	
Bjorn Hansen	500 N. Main St	bjorn.hansen@unioncountync.gov
John Wears	500 N. Main St.	john.wear@unioncountync.gov
Richard Ashley	4513 Waxhaw Hwy.	rashley4@carolina.rr.com
Kathy & Ed Davis	4513 Waxhaw Hwy.	eddavis569@gmail.com
		kadavis31@gmail.com

Rezoning Request CZ-2026-001 Marcham

This case is requesting to rezone one parcel totaling 5 acres appearing on the tax map as tax parcel 09-414-019A along NC 75 from RA-40 to Light Industrial (LI) CZ with Amended Conditions in order to develop a landscaping supply business and limited construction equipment storage. The rezoning will include the following conditions:

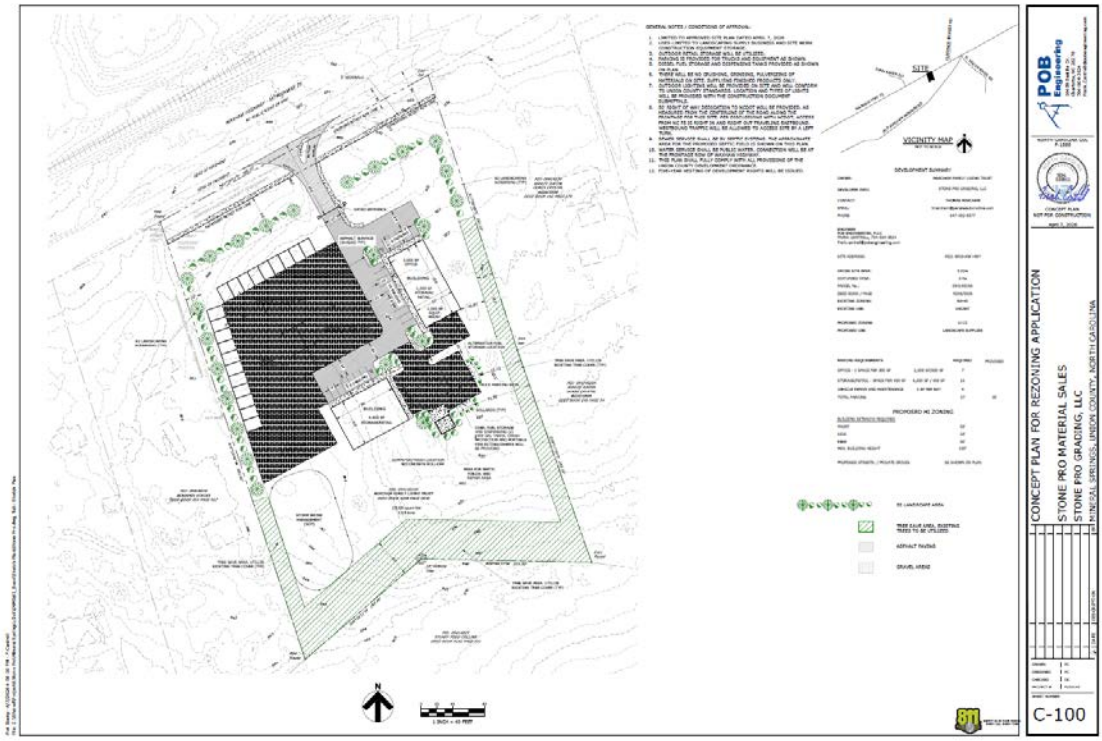
1) Limited to approved site plan dated April 7, 2026

2) Uses limited to landscaping supply business and construction equipment storage

3) Five-year vesting of development rights

4) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval

5) Access may be restricted to right in right out in the future, at the discretion of the NCDOT, based on safety issues that may be created by this site



Planning Department
500 North Main Street, Suite 70
Monroe, NC 28112
T 704.283.3565

unioncountync.gov

Contact Information

1. Staff: Bjorn E. Hansen, Senior Planner, 704-283-3690, bjorn.hansen@unioncountync.gov
2. Owner: Marcham Family Living Trust, 2904 McNeely Farms Drive, Waxhaw, NC 28173
3. Applicant: Thomas Marcham, 2904 McNeely Farms Drive, Waxhaw, NC 28173

Property Information

Located on the south side of NC 75 west of Rocky River Road. Location more specifically described as tax parcel 09-414-019A.



Site



North of Site



West of Site



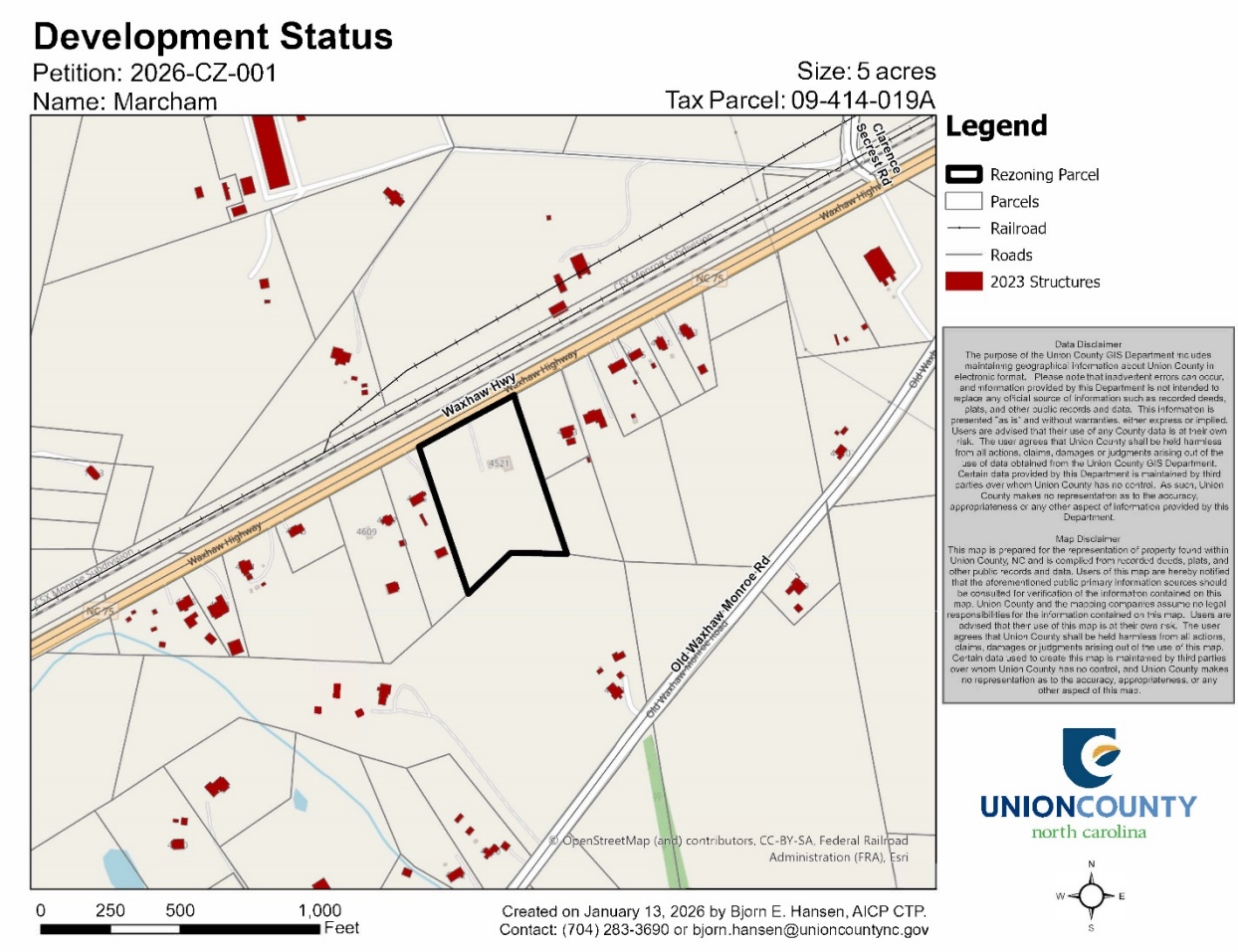
East of Site

Municipal Proximity

The site is approximately 2/3 of a mile east of Mineral Springs.

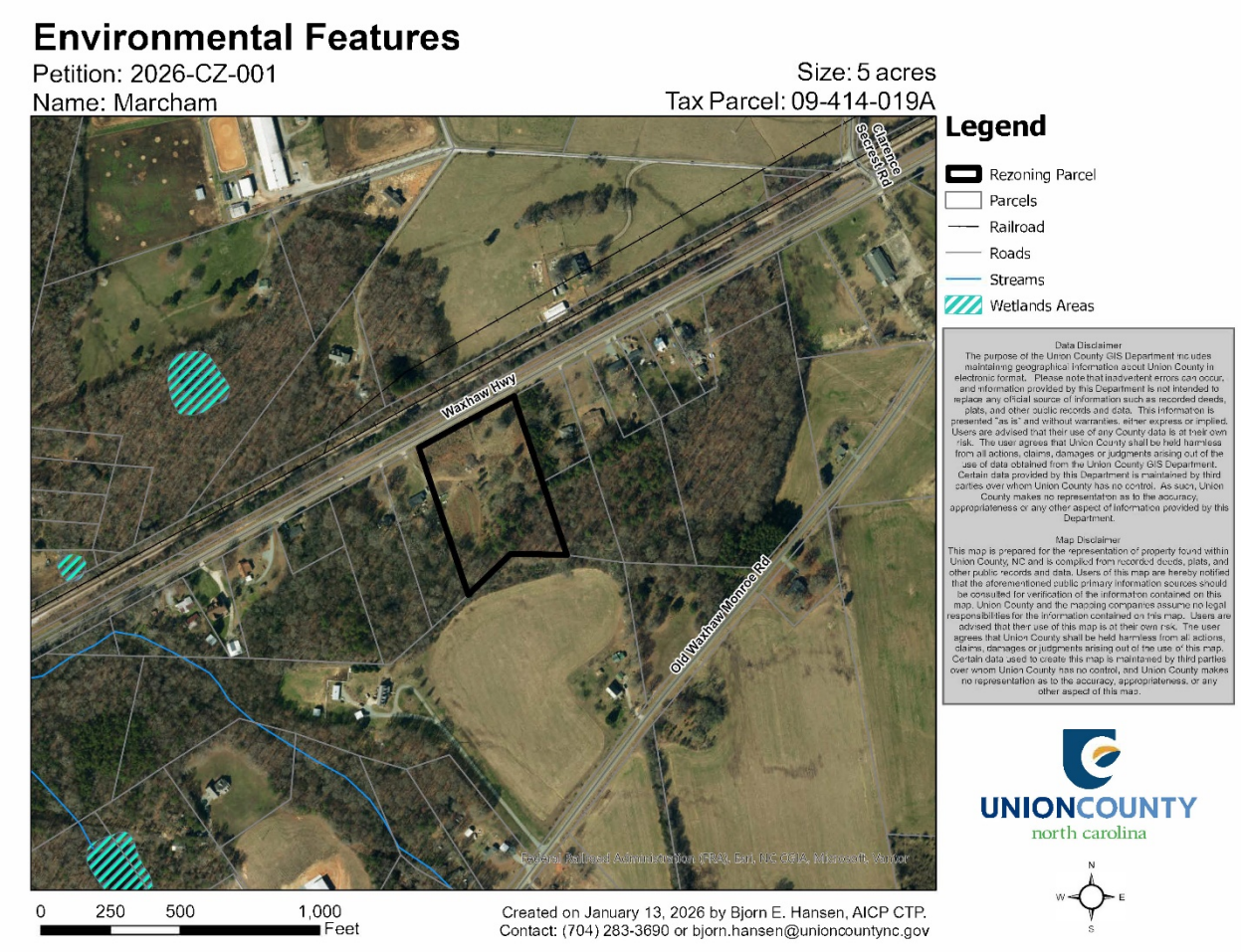
Existing Land Use and Development Status

The parcel is currently zoned RA-40 and is partially cleared. A single-family home was removed approximately six years ago.



Environmental Features

There is a stream on the northern edge of the site that is incorporated into the stormwater pond. There are no other environmental features.

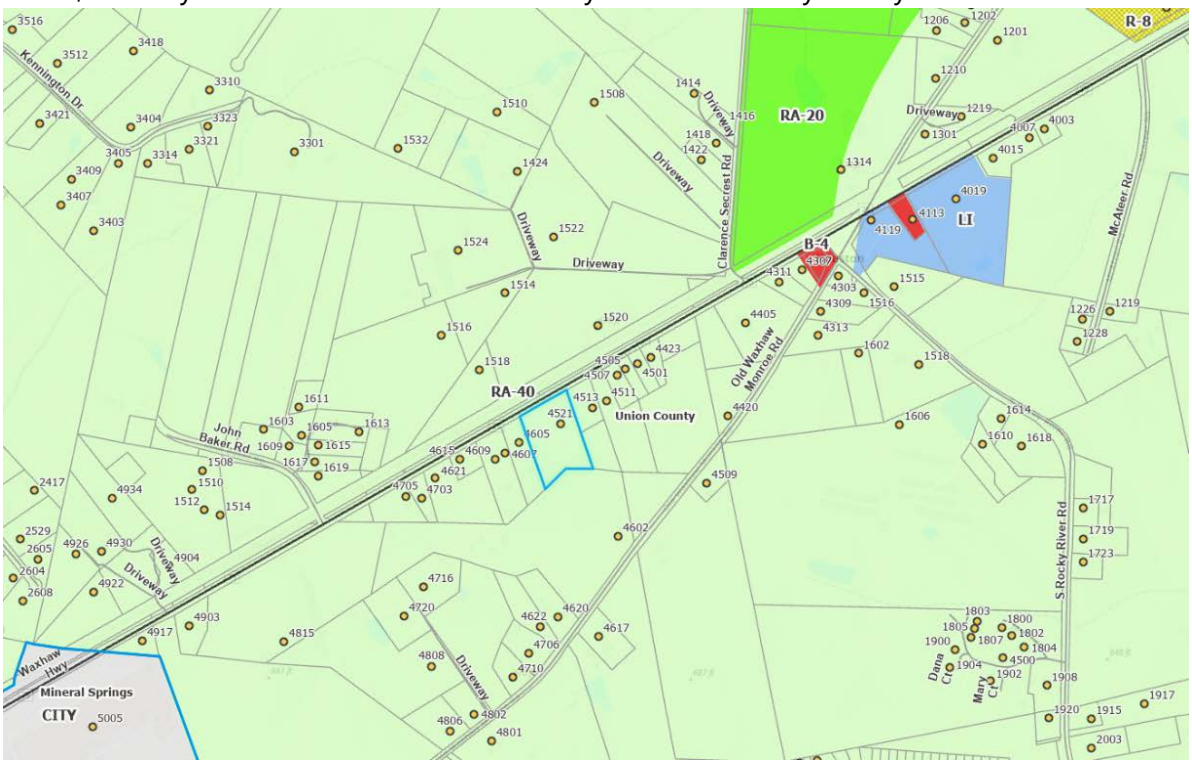


Utilities

Public water is available to the site. The site will use septic service and an area is shown on the site plan.

Zoning and Land Use History

The parcel site has been zoned RA-40 since zoning was instituted. There have been three proposed residential rezonings for higher density development within a half mile of the site since 2019. All three were denied. Three commercial or industrial rezonings were approved at the intersection of Rocky River and NC 75 between 1977 and 2013. Several special use permits have been approved at the intersection of Rocky River and NC 75 for a telecommunications tower, two daycares and for the Union County Humane Society facility.

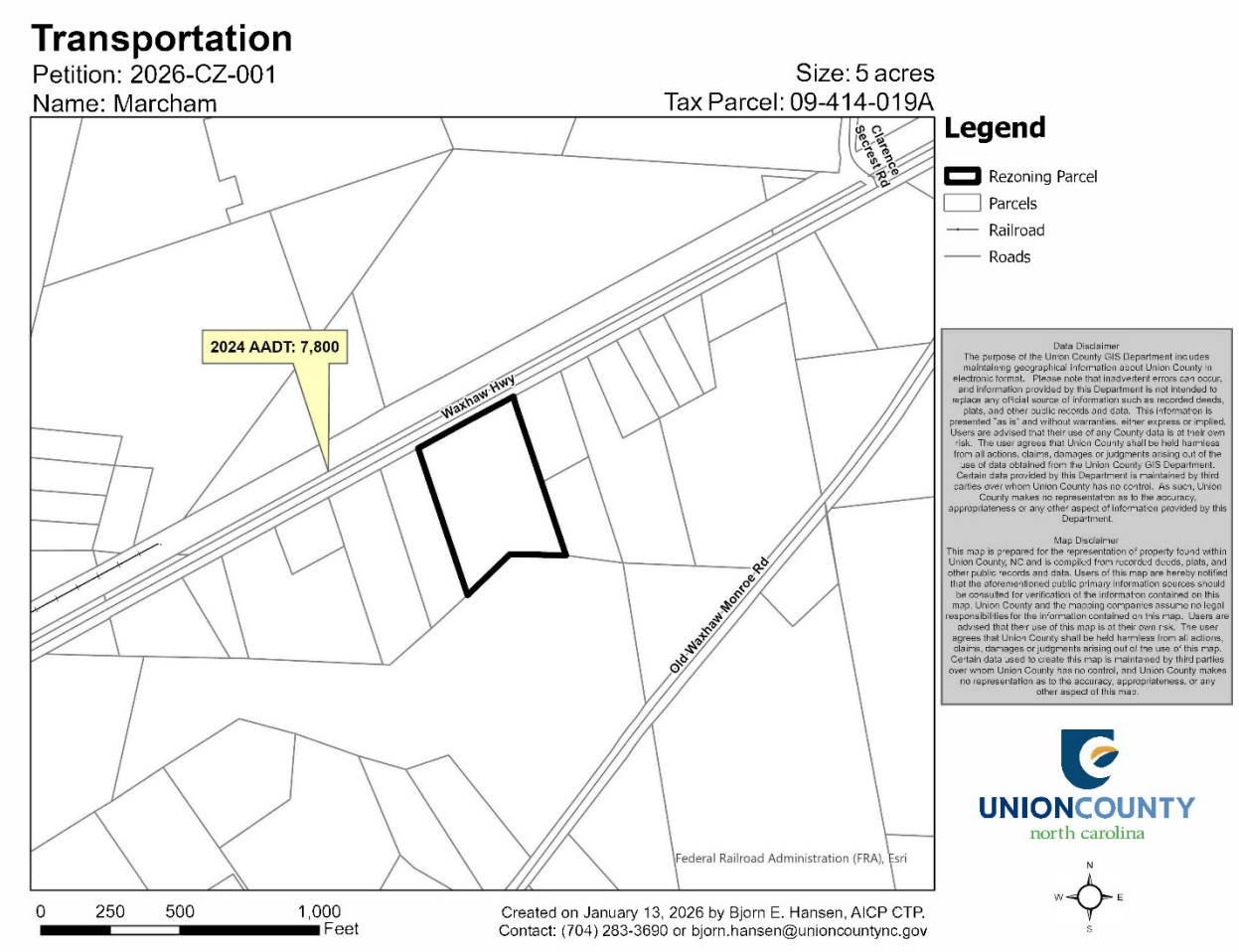


Schools

Because this rezoning request is commercial in nature, UCPS was not consulted for comments.

Transportation

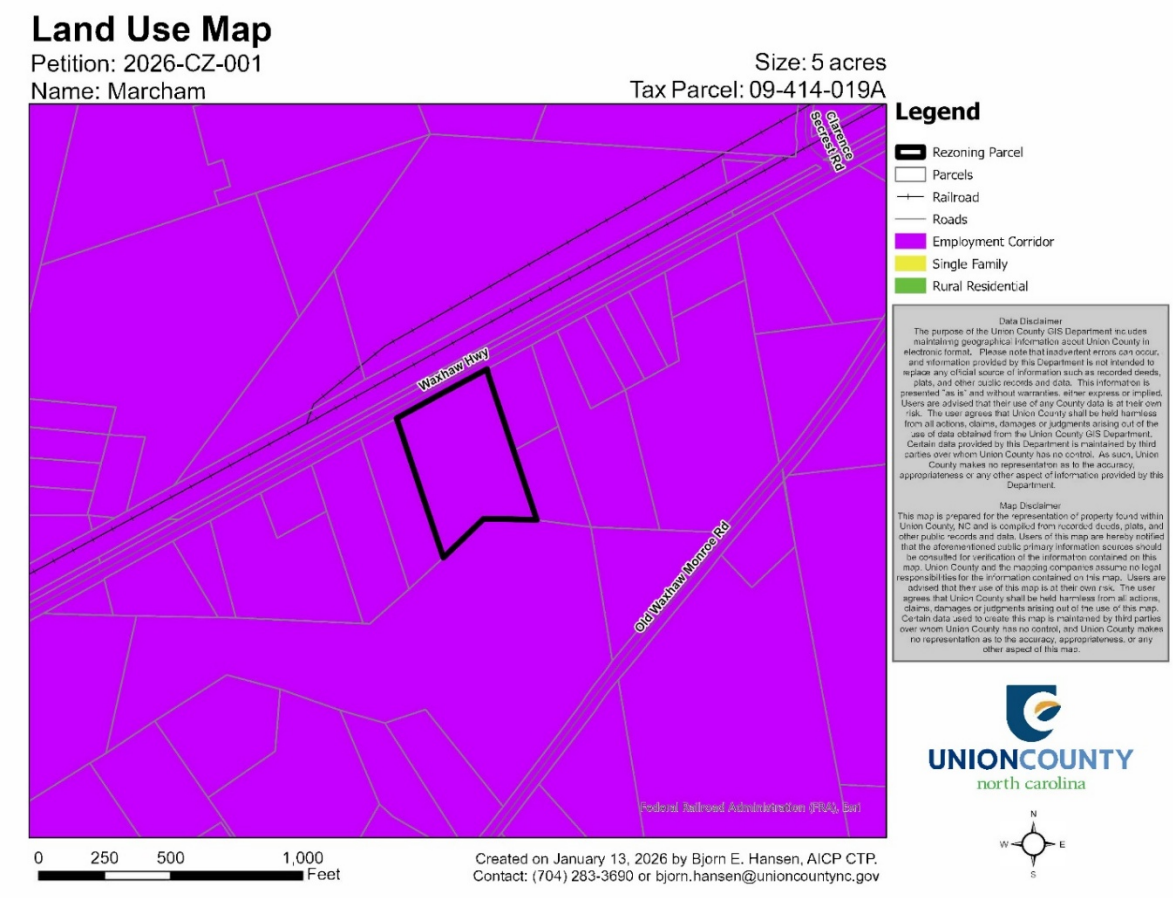
This parcel is on NC 75, which is a NCDOT-maintained facility. NC 75 carries approximately 7,800 vehicles per day. The proposed use would have a low traffic impact but would have a high percentage of trucks and vehicles with trailers. Because of these concerns, the access from the site is limited to right outs, with these vehicles wanting to travel west to use the roundabout at Rocky River Road. There are no funded road improvement projects in the immediate vicinity of the rezoning. A Traffic Impact Analysis was not required for this rezoning.



Union County Comprehensive Plan

The Union County 2050 comprehensive plan identifies this area as a Rural Residential area with an Employment Corridor Overlay. The uses proposed under Light Industrial zoning require a special use permit, which can be incorporated into the rezoning. The applicant has stated in their application, submitted documentation or staff have concluded through a site plan review that it meets the five findings of fact necessary for a special use permit:

1. The proposed use and development comply with all regulations and standards generally applicable within the zoning district and specifically applicable to the particular type of special use.
2. The proposed development will not materially endanger the public health or safety.
3. The proposed development will not substantially injure the value of abutting property, or is a public necessity.
4. The proposed development will be in harmony with the area in which it is located.
5. The proposed development will be in general conformity with the comprehensive plan.



Public and Municipal Comments

Public Comments

A community meeting was required and was held on March 30, 2026. A total of six residents attended the meeting and asked questions about fencing, lighting, traffic and stormwater impacts. No changes were made to the site plan as a result of the meeting.

A public hearing was conducted May 18, 2026. No one spoke for or against the proposed rezoning.

Municipal Comments

Mineral Springs was contacted and responded that they did not have any issues with the proposed rezoning.

Recommendations

Land Use Board

The Land Use Board evaluated this rezoning request at its April 21, 2026, meeting. The Board recommended approval on a 5-0 vote, citing consistency with the land use map.

Planning Department

This part of Union County is identified as an Employment Corridor overlaid on rural residential and agricultural land uses. The proposed use is allowed in Light Industrial with a Special Use Permit, which the applicant had stated they meet the conditions for such a permit, and Light Industrial is an appropriate zoning designation in an Employment Corridor. The proposed traffic impacts are moderate and have been mitigated in the site plan and this use will provide options to residents in the area and increase business opportunities in Union County. The proposed use is therefore considered appropriate for the area. Because of these aspects of the development, staff recommend **approval** of this rezoning application.

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2026-001)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-001) submitted by Tom Marcham, requesting a revision of the Union County Zoning Map by rezoning one parcel of land totaling approximately 5 acres appearing on the tax map as tax parcel 09-414-019A on NC 75 from RA-40 to Light Industrial (LI) with Conditions.

TO *APPROVE* THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion

(i) Adopt the Ordinance Approving Revision to the Official Zoning Map of Union County, North Carolina, and (ii) adopt the consistency and reasonableness statement for approval.

TO *DENY* THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion

(i) Deny rezoning petition CZ-2026-001 submitted by Tom Marcham; and (ii) adopt the consistency and reasonableness statement for denial.

Statements of Consistency and Reasonableness for Proposed Amendment to the Union County Zoning Map

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-001), submitted by Tom Marcham, requesting a revision of the Union County Zoning Map by rezoning one parcel of land totaling approximately 5 acres appearing on the tax map as tax parcel 09-414-019A along NC 75 from RA-40 to Light Industrial (LI) with Conditions.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2026-001)

Pursuant to N.C.G.S. § 160D-605, the Union County Board of Commissioners (the "Board") does hereby find and determine that adoption of the proposed map amendment is consistent with the currently adopted Union County Comprehensive Plan (the "Plan"). The adoption of the proposed map amendment (i) takes into account the need to amend the zoning map to meet the needs of the community, and (ii) is reasonable and in the public interest because:

1. The proposed rezoning is within an area identified as Employment Corridor in the Plan's Land Use Map. The Plan provides that a variety of employment uses may be appropriate in an Employment Corridor, including distribution, logistics, aeronautics, industrial, and agri-business uses. The proposed use is consistent with uses identified for Employment Corridor in the Plan.
2. The proposed use will provide a needed service to nearby residents.
3. The proposed site plan can meet development standards within the Unified Development Ordinance.
4. The tract of land is not overly small for the general area in which it is located and is reasonable in size for the use contemplated.
5. Although the immediate surrounding properties are zoned for residential uses primarily, the property has direct access to NC-75. The property is also located with an approximately three-quarter mile radius of several existing commercial and industrial uses, including several properties zoned as light industrial.
6. The benefits to the community at large, the neighbors, and the property owners of the proposed rezoning outweigh any detriments to the neighbors and others caused by the rezoning. The benefits of this rezoning include increasing business opportunities in Union County, allowing a property with nearby non-residential uses in the area to also be allowed to conduct non-residential uses on its property, and increasing access to use of a service to nearby residents. The potential detriments of the use established by this rezoning include any increased noise, light, and traffic exposure resulting from the proposed use that could affect nearby properties.

CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2026-001)

Pursuant to N.C.G.S. § 160D-605, the Union County Board of Commissioners (the "Board") does hereby find and determine that although the proposal is consistent with the Union County Comprehensive Plan (the "Plan"), that denial of the proposed map amendment is reasonable and in the public interest because:

1. The proposed rezoning will facilitate ongoing and potential future industrial uses in close proximity to existing residential uses.
2. Allowed industrial use on the property could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is a noted concern in the Plan.

ORDINANCE APPROVING REVISION TO THE OFFICIAL ZONING MAP OF UNION COUNTY, NORTH CAROLINA

WHEREAS, the Union County Board of County Commissioners (the "Board") heretofore enacted the "Unified Development Ordinance of Union County, North Carolina," including any amendments thereto (the "UDO") and the official Union County Zoning Map ("Zoning Map"); and

WHEREAS, Union County has received rezoning petition (CZ-2026-001) submitted by Tom Marcham (the "Applicant"), requesting a revisions of the Zoning Map by rezoning one parcel of land totaling approximately 5 acres appearing on the tax map as tax parcel 09-414-019A along NC 75 from RA-40 to Light Industrial (LI) with Conditions (the "Rezoning Petition"); and

WHEREAS, the Union County Land Use Board considered and made a recommendation concerning approval or denial of the Rezoning Petition; and

WHEREAS, the Board has determined that approval of the Rezoning Petition and rezoning the subject parcel from RA-40 to Light Industrial (LI) with Conditions is reasonable and in the public interest, including for those reasons set forth in the contemporaneously adopted consistency and reasonableness statement.

NOW, THEREFORE, BE IT ORDAINED by the Union County Board of Commissioners as follows:

1. The Zoning Map is hereby amended by rezoning the parcel appearing on the tax map as tax parcel 09-414-019A located along NC 75 from RA-40 to Light Industrial (LI) with Conditions.

2. The conditions accepted by the Applicant are hereby approved and incorporated into the Light Industrial (LI) with Conditions rezoning of the parcel.

3. This ordinance is effective upon adoption.

Adopted this _____ day of _____, 2026.

_____
Brian Helms
Chair, Union County Board of Commissioners

File #: 26-315 **Agenda Date:** 6/1/2026

TITLE:

Rezoning Petition CZ-2026-006 House of Pearls

INFORMATION CONTACT:

Bjorn E. Hansen, Planning Department, Senior Planner - Current Planning, 704-283-3690

ACTION REQUESTED:

Approve or deny rezoning petition.

To ***approve*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) Adopt the Ordinance Approving Revision to the Official Zoning Map of Union County, North Carolina and the associated Master Planned Development Plan, and (ii) adopt the consistency and reasonableness statement for approval.

To ***deny*** the proposed amendment (the proposal is consistent with the current plan)

Motion

(i) Deny rezoning petition CZ-2026-006 submitted by Steve Merritt and the associated Master Planned Development Plan; and (ii) adopt the consistency and reasonableness statement for denial.

PRIOR BOARD ACTION:

None.

BACKGROUND:

This case is a request to rezone an approximately 10.92 acre portion of one parcel totaling 12.21 acres appearing on the tax map as tax parcel 02-226-017 located on Camden Road from RA-40 to a Master Planned Development District. The request is to develop a long-term residential drug rehabilitation facility for up to 80 residents and staff. The rezoning request is a conditional rezoning and includes the following conditions:

- The use shall be limited to a residential recovery and life-skills program.
- The maximum duration of residency for program participants shall be twenty-four (24) months. The minimum duration of residency for program participants shall be ninety (90) days.

- The use shall not include medical detoxification or inpatient clinical treatment services.
- The use shall not be converted to a shelter, boarding house, correctional facility, halfway house for parolees, or a use not specifically allowed by these conditions.
- Overnight occupancy shall be limited to enrolled program participants and on-site staff only.
- The maximum number of residents shall not exceed 80.
- The development may occur in phases.
- All outdoor lighting shall utilize full cutoff fixtures and shall be directed away from adjacent properties.
- Organized outdoor activities shall not occur on site between 9 PM and 7 AM.
- A local contact person shall be provided to adjacent property owners and the County and updated annually.
- No onsite parking for resident vehicles.

The Land Use Board evaluated this rezoning request at its April 21, 2026, meeting. The Board recommended approval on a 5-0 vote, citing consistency with the land use map.

A public hearing was conducted on May 18, 2026. Over one dozen people spoke in favor of the rezoning, citing the effectiveness of the program and the minimal impacts to the surrounding area. One person spoke against, citing inappropriate uses near residential and rural areas, as well as a dangerous intersection immediately west of the site.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

Union County
Planning Department
500 N Main Street - Suite 70
Monroe, NC 28112
T 704.283.3565
E UCPlanning@unioncountync.gov

General Information

Project Address 0 Camden Road City Marshville State NC Zip 28103

Tax Parcel ID 02226017 Current Zoning Designation RA-40 Total Acres 12.21

Proposed Zoning Designation RA-40 (CD) Date Submitted 2/18/2026

Contact Information

Applicant Name Steve Merritt (His Perfect Love Ministries Inc)

Address PO Box 516 City Marshville State NC Zip 28111

Phone 704-622-6030 Fax _____ Email _____

Property Owner Name Steve Merritt (His Perfect Love Ministries Inc)

Address PO Box 516 City Marshville State NC Zip 28111

Phone 704-622-6030 Fax _____ Email _____

Applicant's Certification

Signature | 2/23/2026 Date | STEVEN D. MERRITT. Printed Name/Title CHAIRMAN OF BOARD

Owner's Certification (include names and signatures of all owners)

Signature | 2/23/2026 Date | STEVEN D. MERRITT Printed Name/Title CHAIRMAN OF BOARD

Union County Office Use Only:

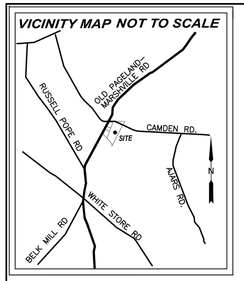
Case Number: _____ Date Received: _____

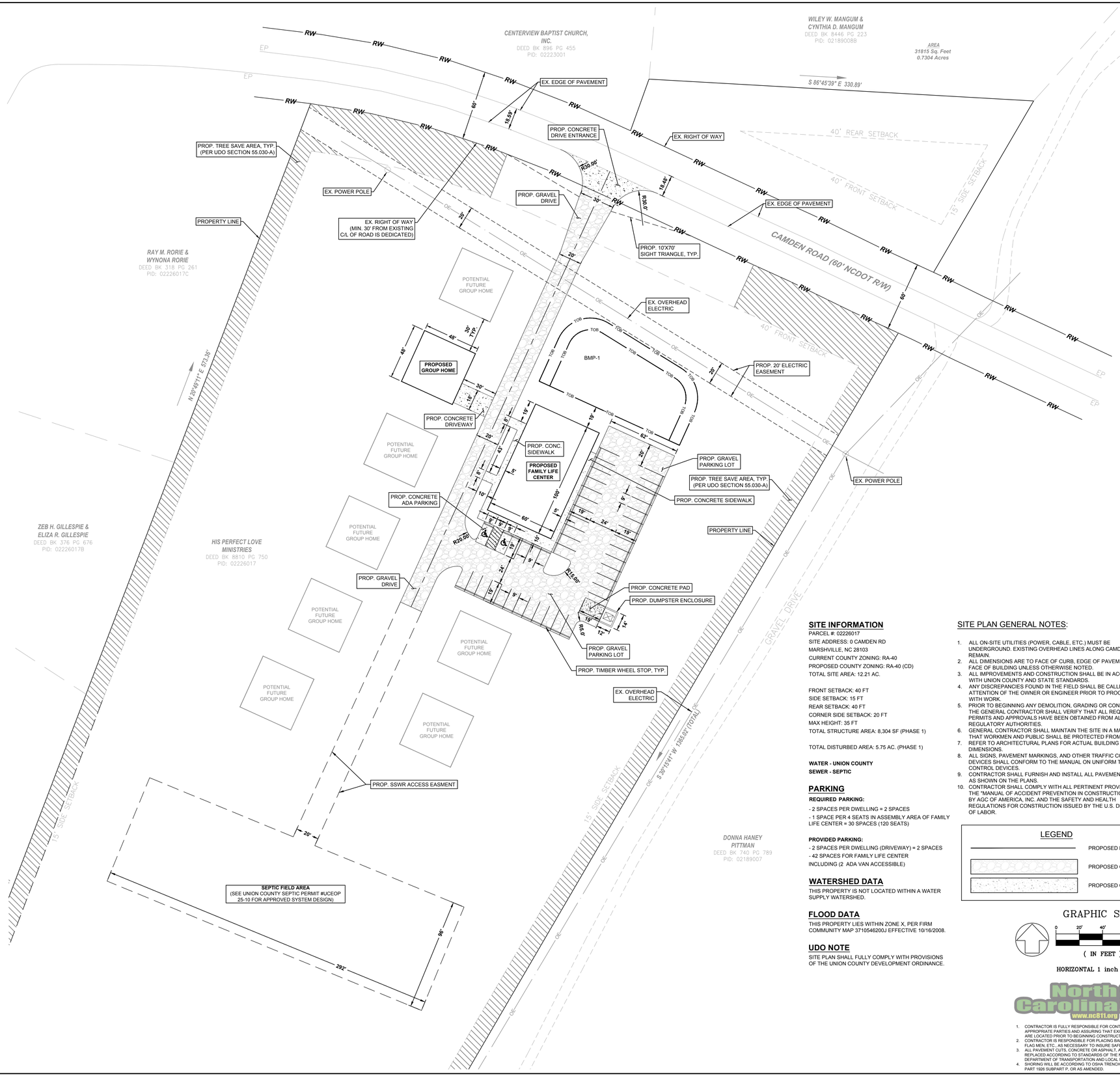
Amount of Fee: _____ Fee Ok: _____ Received by: _____

Contact Bjorn Hansen to begin the process. T. 704.283.2690 E. Bjorn.hansen@unioncountync.gov

UNIONCOUNTY north carolina

**This document is only valid from July 1, 2025 - June 30, 2026





SITE INFORMATION

PARCEL #: 02226017
SITE ADDRESS: 0 CAMDEN RD
MARSHVILLE, NC 28103
CURRENT COUNTY ZONING: RA-40
PROPOSED COUNTY ZONING: RA-40 (CD)
TOTAL SITE AREA: 12.21 AC.

FRONT SETBACK: 40 FT
SIDE SETBACK: 15 FT
REAR SETBACK: 40 FT
CORNER SIDE SETBACK: 20 FT
MAX HEIGHT: 35 FT
TOTAL STRUCTURE AREA: 8,304 SF (PHASE 1)

TOTAL DISTURBED AREA: 5.75 AC. (PHASE 1)

WATER - UNION COUNTY
SEWER - SEPTIC

PARKING

REQUIRED PARKING:

- 2 SPACES PER DWELLING = 2 SPACES
- 1 SPACE PER 4 SEATS IN ASSEMBLY AREA OF FAMILY LIFE CENTER = 30 SPACES (120 SEATS)

PROVIDED PARKING:

- 2 SPACES PER DWELLING (DRIVEWAY) = 2 SPACES
- 42 SPACES FOR FAMILY LIFE CENTER
INCLUDING (2 ADA VAN ACCESSIBLE)

WATERSHED DATA

THIS PROPERTY IS NOT LOCATED WITHIN A WATER SUPPLY WATERSHED.

FLOOD DATA

THIS PROPERTY LIES WITHIN ZONE X, PER FIRM COMMUNITY MAP 3710546200J EFFECTIVE 10/16/2008.

UDO NOTE

SITE PLAN SHALL FULLY COMPLY WITH PROVISIONS OF THE UNION COUNTY DEVELOPMENT ORDINANCE.

SITE PLAN GENERAL NOTES:

1. ALL ON-SITE UTILITIES (POWER, CABLE, ETC.) MUST BE UNDERGROUND. EXISTING OVERHEAD LINES ALONG CAMDEN RD MAY REMAIN.
2. ALL DIMENSIONS ARE TO FACE OF CURB, EDGE OF PAVEMENT, OR FACE OF BUILDING UNLESS OTHERWISE NOTED.
3. ALL IMPROVEMENTS AND CONSTRUCTION SHALL BE IN ACCORDANCE WITH UNION COUNTY AND STATE STANDARDS.
4. ANY DISCREPANCIES FOUND IN THE FIELD SHALL BE CALLED TO THE ATTENTION OF THE OWNER OR ENGINEER PRIOR TO PROCEEDING WITH WORK.
5. PRIOR TO BEGINNING ANY DEMOLITION, GRADING OR CONSTRUCTION, THE GENERAL CONTRACTOR SHALL VERIFY THAT ALL REQUIRED PERMITS AND APPROVALS HAVE BEEN OBTAINED FROM ALL REGULATORY AUTHORITIES.
6. GENERAL CONTRACTOR SHALL MAINTAIN THE SITE IN A MANNER SO THAT WORKMEN AND PUBLIC SHALL BE PROTECTED FROM INJURY.
7. REFER TO ARCHITECTURAL PLANS FOR ACTUAL BUILDING DIMENSIONS.
8. ALL SIGNS, PAVEMENT MARKINGS, AND OTHER TRAFFIC CONTROL DEVICES SHALL CONFORM TO THE MANUAL ON UNIFORM TRAFFIC CONTROL DEVICES.
9. CONTRACTOR SHALL FURNISH AND INSTALL ALL PAVEMENT MARKINGS AS SHOWN ON THE PLANS.
10. CONTRACTOR SHALL COMPLY WITH ALL PERTINENT PROVISIONS OF THE "MANUAL OF ACCIDENT PREVENTION IN CONSTRUCTION" ISSUED BY AGC OF AMERICA, INC. AND THE SAFETY AND HEALTH REGULATIONS FOR CONSTRUCTION ISSUED BY THE U.S. DEPARTMENT OF LABOR.

LEGEND

- PROPOSED BUILDING
- PROPOSED GRAVEL
- PROPOSED CONCRETE

GRAPHIC SCALE

0 20' 40' 80'

(IN FEET)

HORIZONTAL 1 inch = 40 ft.

North Carolina 811 www.nc811.org

1. CONTRACTOR IS FULLY RESPONSIBLE FOR CONTACTING APPROPRIATE PARTIES AND ASSURING THAT EXISTING UTILITIES ARE LOCATED PRIOR TO BEGINNING CONSTRUCTION.
2. CONTRACTOR IS RESPONSIBLE FOR PLACING BARRICADES USING FLAG MEN, ETC., AS NECESSARY TO INSURE SAFETY.
3. ALL PAVEMENT CUTS, CONCRETE OR ASPHALT, ARE TO BE REPLACED ACCORDING TO STANDARDS OF THE NORTH CAROLINA DEPARTMENT OF TRANSPORTATION AND LOCAL MUNICIPALITIES.
4. SHORING WILL BE ACCORDING TO OSHA TRENCHING STANDARDS PART 1926 SUBPART P, OR AS AMENDED.

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GATEWAY DESIGN GROUP, PLLC
8516 FOXBRIDGE DR WEDDINGTON, NC 28104
910-840-2661
NC FIRM # P-2147

NORTH CAROLINA PROFESSIONAL SEAL 055352 ENGINEER MARK A. DIAMOND
2026.02.23 08:54:34-05'00'

HOUSE OF PEARLS

Project Address: 0 Camden Rd, Marshville, NC 28103

NO.	BY	DATE	REVISION

PROJECT #: 2024-173 DATE: 2/23/2026
DRAWN BY: MD CHECKED BY: MD

TITLE
SITE PLAN

SHEET NO.
C-2.0

C:\Users\mark\Gateway Design Group Dropbox\Projects\2024\2024-173 – Camden Rd\CADD\Plotsheets\C-2.0 SITE PLAN.dwg MARK

The House of Pearls is a non-profit, 501(c)3, Christian ministry dedicated to helping women rebuild their lives through the love of Jesus Christ.

House of Pearls is a long-term addiction and heart restoration program where women voluntarily reside at no cost to them and learn the healing power of the Word of God through intensive bible study and teaching. While in the program, the residents are also taught various life skills including:

- **manners and etiquette**
- **communication**
- **accountability**
- **budgeting**
- **cooking**
- **work ethics**
- **G.E.D**

Embark on a journey of faith and recovery with our 1-year Faith Based Christian program, where faith meets recovery and transformation happens.

The purpose of House of Pearls is best summarized in our mission statement, which is, “To provide a safe environment for women to heal, restore, and rebuild their lives, embracing and representing the love of Jesus Christ." God has provided the Cross of Jesus Christ as the only true escape from bondage. At the House of Pearls, we seek to point women to the reality of the indwelling Christ as the ever-present Savior from sin and His provision of the Holy Spirit who transforms people in every area of their life. When coming to the House of Pearls, the ladies will embark on a journey of faith and recovery with our 1-year Faith Based Christian program, where faith meets recovery and transformation happens.

Camden Rd, Marshville, NC 28103 - House of Pearls Project

Tax Parcel **02226017**

Subject: Development of Faith Based Housing Community for Women in Recovery

To Whom It May Concern,

This Letter of Intent outlines our plan to develop a supportive residential community designed to provide a safe, structured, and restorative environment for women recovering from substance abuse.

The proposed property will include the construction of eight residential homes and one central gathering center. Each home will accommodate nine women residents and one live-in House Manager, creating a supportive, family-style living environment that fosters accountability, stability, and peer encouragement. In total, the community will serve up to seventy-two women at full capacity.

The central gathering center will include office space for administrative operations, meeting areas for group programming, and a full kitchen to support communal activities and life-skills training. This facility will serve as the heart of the community, offering educational programming, recovery meetings, counseling sessions, and workshops.

To ensure the safety and stability of the residents, onsite staff will be present 24 hours a day, seven days a week. An Executive Director will be onsite during normal business hours to oversee daily operations, staff supervision, program coordination, and compliance with all applicable regulations.

In addition to residential supervision, we will periodically host licensed counselors, pastors, educators, and trained volunteers who will provide supportive services, including recovery education, life-skills training, spiritual guidance (upon request), and personal development programming. These services are designed to equip residents with the tools necessary for long-term sobriety, employment readiness, and successful reintegration into independent living.

Our mission is to create a secure, faith based structured, and compassionate environment where women can heal, rebuild their lives, and develop the skills and confidence necessary to achieve sustainable recovery.

We are committed to operating this community responsibly, maintaining high standards of safety and accountability, and being a positive and collaborative presence within the surrounding community.

Thank you for your consideration of this important initiative. We welcome the opportunity to provide any additional information needed.

Sincerely,
Steven D. Merritt

His Perfect Love Ministries – House of Pearls

704-622-6030

Sdmerritt13@aol.com

From:	Steve Merritt
To:	Bjorn Hansen
Cc:	Mark Diamond
Subject:	Re: House of Pearls Rezoning Application
Date:	Tuesday, April 7, 2026 6:29:43 AM

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Good Morning Bjorn,

I am requesting a five year vesting rights as a condition of this rezoning for The House of Pearls project located on Camden Rd in Marshville, NC. Thanks and have a great day!!

Steve Merritt
His Perfect Love Ministries
House of Pearls
704-622-6030

On Monday, April 6, 2026 at 11:55:04 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Steve, hopefully the last email today. I don't see any email or correspondence requesting the five-year vesting of this rezoning (if approved). State law says you automatically get two years guaranteed to start development of your project, but you can request up to five years. The benefit is that it protects you from a potential downzoning by the County if you don't move forward with the project. It is typical for applicants to request five years, but you have to request it. Weird, I know. All you have to do is email back and state you are requesting five year vesting rights as a condition of this rezoning.
>
> Sincerely,
>
> Bjorn
>
> **Bjorn E. Hansen, AICP CTP, CZO**
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
> unioncountync.gov
>
> ***We're committed to excellent service.*** *Share your feedback in this short survey.*
>
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recipient of this e-mail, please contact the sender immediately.

From: Steve Merritt <sdmerritt13@aol.com>
Sent: Friday, April 3, 2026 5:57 AM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Good Morning Bjorn,
Please find the Minutes and Sign In Sheets for the Community meeting held for the House of Pearls Camden Rd Project. Thanks for your help and have a great Easter!!!

Steve Merritt
House of Pearls
704-622-6030

On Thursday, March 19, 2026 at 09:53:31 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Thanks, Steve. When we see each other at the community meeting could you please have a signed copy.
>
> Take care.
>
> Bjorn
>
> **Bjorn E. Hansen, AICP CTP, CZO**
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
> unioncountync.gov
>
> ***We're committed to excellent service.*** *Share your feedback in this short survey.*
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>
> ---
>
> **From:** Steve Merritt <sdmerritt13@aol.com>

Sent: Thursday, March 19, 2026 6:36 AM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Good Morning Bjorn,
Please find attached the letter from the Secretary/Treasurer of His Perfect Love Ministries and The House of Pearls explaining my realtionship with this organization. Thanks and have a great day!!

Steve Merritt
House of Pearls
704-622-6030

On Monday, March 16, 2026 at 04:47:28 PM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Sounds good. I will note that in the conditions of the rezoning.
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
>
> unioncountync.gov
>
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From: Steve Merritt <sdmerritt13@aol.com>
Sent: Monday, March 16, 2026 4:45 PM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Bjorn,

I think just the portion where the facility is located.

Steve

On Monday, March 16, 2026 at 10:41:23 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Good morning,
>
> Please confirm you would like the entire parcel rezoned versus just the portion on the south side of Camden Road where the facility will be located.
>
> Sincerely,
>
> Bjorn
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Wednesday, March 11, 2026 10:05 AM
To: mark@gatewaydesigngroup.com; 'Steve Merritt' <sdmerritt13@aol.com>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application

I have attached the mailing labels for the community meeting. Something to think about for the rezoning is the fact you have a portion of the property on the north side of the road (see attached land use map). You might want to sell it in the future, and it is not necessary to rezone to MPD. You can clarify in your letter of intent to say that this rezoning only applies to the portion on the south side of Camden Road. If you want the rezoning to apply to all of the property, just let me know.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: mark@gatewaydesigngroup.com <mark@gatewaydesigngroup.com>
Sent: Wednesday, March 11, 2026 8:26 AM
To: 'Steve Merritt' <sdmerritt13@aol.com>; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application

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Good morning Bjorn,

Please see attached rezoning documents.

Thanks!

Mark Diamond, P.E.

Project Manager

Gateway Design Group, PLLC

919-368-8867

8516 Foxbridge Drive

Weddington, NC 28104

From: Steve Merritt <sdmerritt13@aol.com>
Sent: Wednesday, March 11, 2026 8:21 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

Bjorn,

I believe Mark Diamond sent all of that information to you via email last week.

Mark can you resend that information to Bjorn? Thanks

Steve Merritt

On Wednesday, March 11, 2026 at 08:13:28 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Steve,
>
> I appreciate you being proactive with the community meeting work, but we need the rezoning application to be submitted before any letters can be sent out. I am in the office today and then out Thursday and Friday. Let me know if you are able to drop the materials off today.
>
> I made a few proposed changes in Track Changes in the attached document.
>
> Sincerely,
>
> Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: Steve Merritt <sdmerritt13@aol.com>
Sent: Wednesday, March 11, 2026 7:42 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Good Morning Bjorn,

Please find the Notice Letter (Community Meeting) attached. Thanks and have a great day!!!

Schedule is March 31, 2026

Dinner Served at 6:00

Meeting to start at 6:30

Centerview Baptist Church - Fellowship Building

2711 Old Pageland-Marshville Rd

Marshville, NC

Steve Merritt

House of Pearls

His Perfect Love Ministries

704-622-6030

On Monday, March 9, 2026 at 02:02:39 PM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Will do. It's on my calendar. Please submit the application materials and draft community letter for me to review ASAP. I can then send you the address list for you to mail the meeting notices to. The letters need to be in the mail by next Friday.
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
>
> unioncountync.gov
>
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From: sdmerritt13 (null) <sdmerritt13@aol.com>
Sent: Monday, March 9, 2026 1:56 PM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Ok. That makes sense. Let's lock in Tuesday March 31.

Steve

Sent from my iPhone

> On Mar 9, 2026, at 1:36 PM, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:
>
> I am but that is the night before Good Friday, so I suspect it won't work well for people to attend.
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department
>
> T 704.283.3690
>
> bjorn.hansen@unioncountync.gov
>
> unioncountync.gov
>
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recipient of this e-mail, please contact the sender immediately.

From: sdmerritt13 (null) <sdmerritt13@aol.com>
Sent: Monday, March 9, 2026 1:27 PM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Bjorn,

Would you be available for a meeting on April 2? That is a Thursday night 6 o'clock at Centerview Baptist Church in Marshville.

Steve Merritt

704-622-6030

Sent from my iPhone

> On Mar 9, 2026, at 8:14 AM, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:
>
> Steve,
>
> Thank you for the update.
>
> 1. Regarding the community meeting, I now have another rezoning meeting on March 30. I am still available on March 31 and April 1 though.

2. For payment, once you submit the application we can send an invoice through our Evolve review portal, but honestly it would be a lot easier if you delivered all paperwork in person so I can confirm everything is ok.
3. You can submit the petition and other meeting materials as part of the application. I can reference it in the staff report, but the community meeting in a few weeks would be the definitive one.
4. I can appreciate your frustration, and the good news is that the utility work you have done would have been required anyways, so you can move to implementation earlier than if you did the rezoning first and then the utility work. The rezoning will ideally be complete on June 1, but the Board of Commissioners has the option of approving the night of the hearing, which hopefully will be May 18.

Please let me know if you have any questions.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: Steve Merritt <sdmerritt13@aol.com>
Sent: Monday, March 9, 2026 8:06 AM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Good Morning Bjorn,

Thank you for the information provided below. To recap, this has been quite a journey for the House of Pearls. I'd like to share some background since you haven't always participated in these meetings. We first met with Jim King in 2023, and he gave us a list of items needed to move forward. Following his direction, we held a community meeting at Centerview Baptist Church in Marshville, NC, which over 30 people attended. At this gathering, we presented our site plan, explained the ministry's mission, and hosted a Q&A session. Every attendee signed a petition supporting the project, though Mr. King mentioned the petition was merely hearsay.

To be honest, my frustration is considerable. However, I understand that all county rules, regulations, and codes must be followed before we can proceed. Thanks to your guidance, we are finally making progress. Our organization has served the community for nearly 20 years, helping women transition from the streets into a safe environment, where they can live sober lives and serve God.

I am the Chairman of the Board for His Perfect Love Ministries and the House of Pearls. I'll obtain the necessary

documentation from our Secretary/Treasurer and send it to you.

How should we handle the $1000.00 payment? Is there an option to pay online, or does someone need to deliver a physical check to your department?

I am working on arranging another meeting, possibly on Monday, March 30, at Centerview Baptist Church (2711 Old Pageland-Marshville Rd, Marshville, NC 28103) in their fellowship building. I will confirm this date with you as soon as the church approves the arrangements.

Best Regards,

Steve Merritt

Chairman of The Board of Directors

His Perfect Love Ministries

House of Pearls

704-622-6030

On Tuesday, March 3, 2026 at 02:14:27 PM EST, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Mark,
>
> Here are my comments about the rezoning application:
>
> 1. The proposed zoning district would be Master Planned Development (MPD). I can change on the application form, so really an FYI.
> 2. Provide some sort of documentation

showing Steve's relationship to His Perfect Love Ministries, Inc. allowing him to submit an application.

3. There is an application fee of $1,000.
4. Regarding my earlier comments about prior community meeting documentation, we discussed internally and need a second meeting. The meeting can be in person or virtually. I have attached a sample community letter. Please propose some dates at least two weeks from now. My evening availability is March 23, 25, 26, 30, 31, April 1.

You do not need to go through another site plan review process. We can get you on the April 21 Land Use Board meeting, and then a public hearing with the Board of Commissioners May 18.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: mark@gatewaydesigngroup.com <mark@gatewaydesigngroup.com>
Sent: Tuesday, March 3, 2026 9:30 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: sdmerritt13@aol.com; 'Alec Sithong' <alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application

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Good morning Bjorn,

Wanted to confirm you have received all of the rezoning documents we sent last Friday?

Thanks!

Mark Diamond, P.E.

Project Manager

Gateway Design Group, PLLC

919-368-8867

8516 Foxbridge Drive

Weddington, NC 28104

From: mark@gatewaydesigngroup.com

<mark@gatewaydesigngroup.com>
Sent: Friday, February 27, 2026 1:10 PM
To: 'Bjorn Hansen'
<bjorn.hansen@unioncountync.gov>
Cc: sdmerritt13@aol.com; 'Alec Sithong'
<alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application
Importance: High

Good afternoon Bjorn,

I have attached documents for the rezoning application. Let us know the best way to pay the $1,000 fee and we will get that taken care of as well.

Please let us know if you need anything additional to make sure we are on the agenda for March.

Thanks!

Mark Diamond, P.E.

Project Manager

Gateway Design Group, PLLC

919-368-8867

8516 Foxbridge Drive

Weddington, NC 28104

From: Bjorn Hansen
<bjorn.hansen@unioncountync.gov>
Sent: Thursday, February 12, 2026 11:24 AM
To: sdmerritt13@aol.com;
mark@gatewaydesigngroup.com
Subject: House of Pearls Rezoning Application

Steve and Mark,

My apologies for any confusion. The application form is attached. You will also need to attached the sketch plan and a letter of intent. A letter of intent is you in your own words explaining the proposal. It would be helpful to include details about the proposal – number of residents, employees, activities on site, the fact an septic permit is already in hand, etc. The application fee is $1,000.

I advise you to drop off the forms in person because we can fix anything at that time. Please let me know if you have any questions.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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Union County Government



500 North Main Street, Suite 70

Monroe, NC 28112

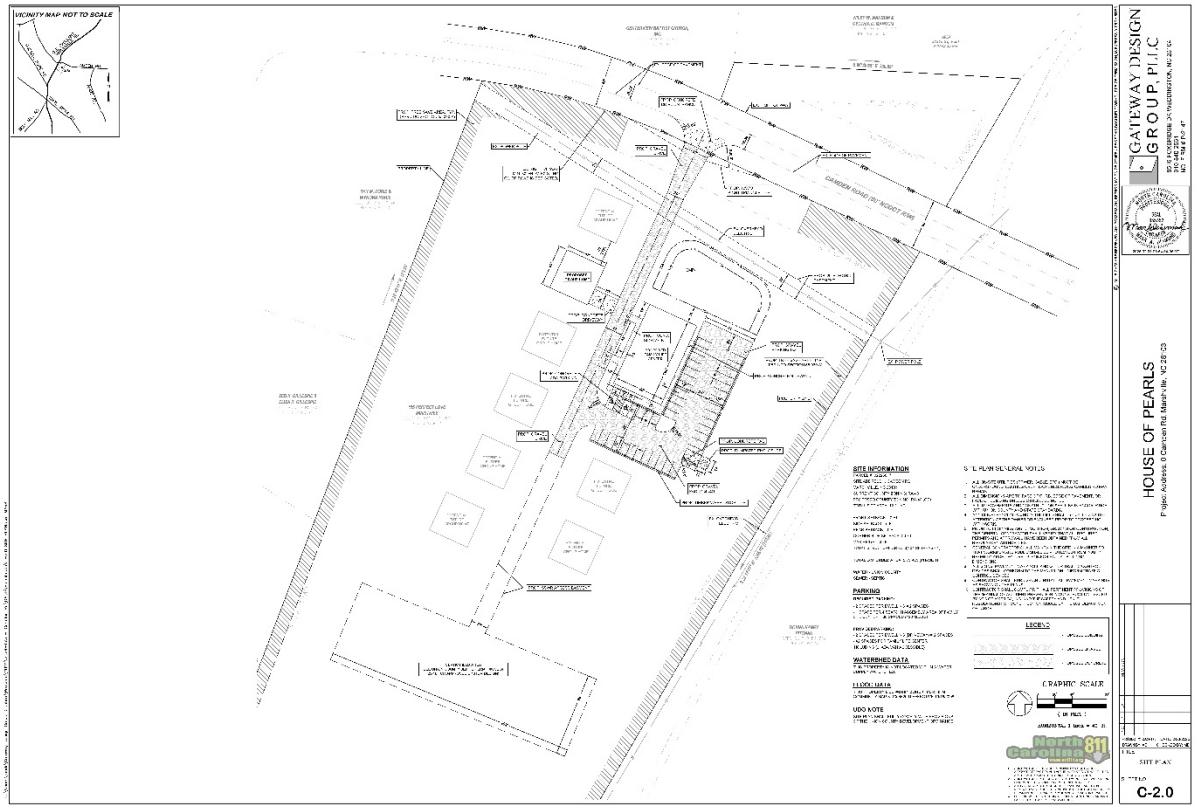
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Rezoning Request CZ-2026-006 House of Pearls

This case is a request to rezone an approximately 10.92 acre portion of one parcel totaling 12.21 acres appearing on the tax map as tax parcel 02-226-017 located on Camden Road from RA-40 to a Master Planned Development District. The request is to develop a long-term residential drug rehabilitation facility for up to 80 residents and staff. The rezoning request is a conditional rezoning, and includes the following conditions:

- The use shall be limited to a residential recovery and life-skills program.
- The maximum duration of residency for program participants shall be twenty-four (24) months. The minimum duration of residency for program participants shall be ninety (90) days.
- The use shall not include medical detoxification or inpatient clinical treatment services.
- The use shall not be converted to a shelter, boarding house, correctional facility, halfway house for parolees, or a use not specifically allowed by these conditions.
- Overnight occupancy shall be limited to enrolled program participants and on-site staff only.
- The maximum number of residents shall not exceed 80.
- The development may occur in phases.
- All outdoor lighting shall utilize full cutoff fixtures and shall be directed away from adjacent properties.
- Organized outdoor activities shall not occur on site between 9 PM and 7 AM.
- A local contact person shall be provided to adjacent property owners and the County and updated annually.
- No onsite parking for resident vehicles.

Planning Department
500 North Main Street, Suite 70
Monroe, NC 28112
T 704.283.3565
unioncountync.gov



Contact Information

1. Staff: Bjorn E. Hansen, Senior Planner, 704-283-3690, bjorn.hansen@unioncountync.gov
2. Owner: His Perfect Love Ministries, Inc., PO Box 516, Monroe, NC 28111
3. Applicant: Steve Merritt, PO Box 516, Monroe, NC 28111

Property Information

Located on the south side of Camden Road east of Old Pageland Marshville Road. Location more specifically described as tax parcel 02-226-017.



Site



North of Site



West of Site



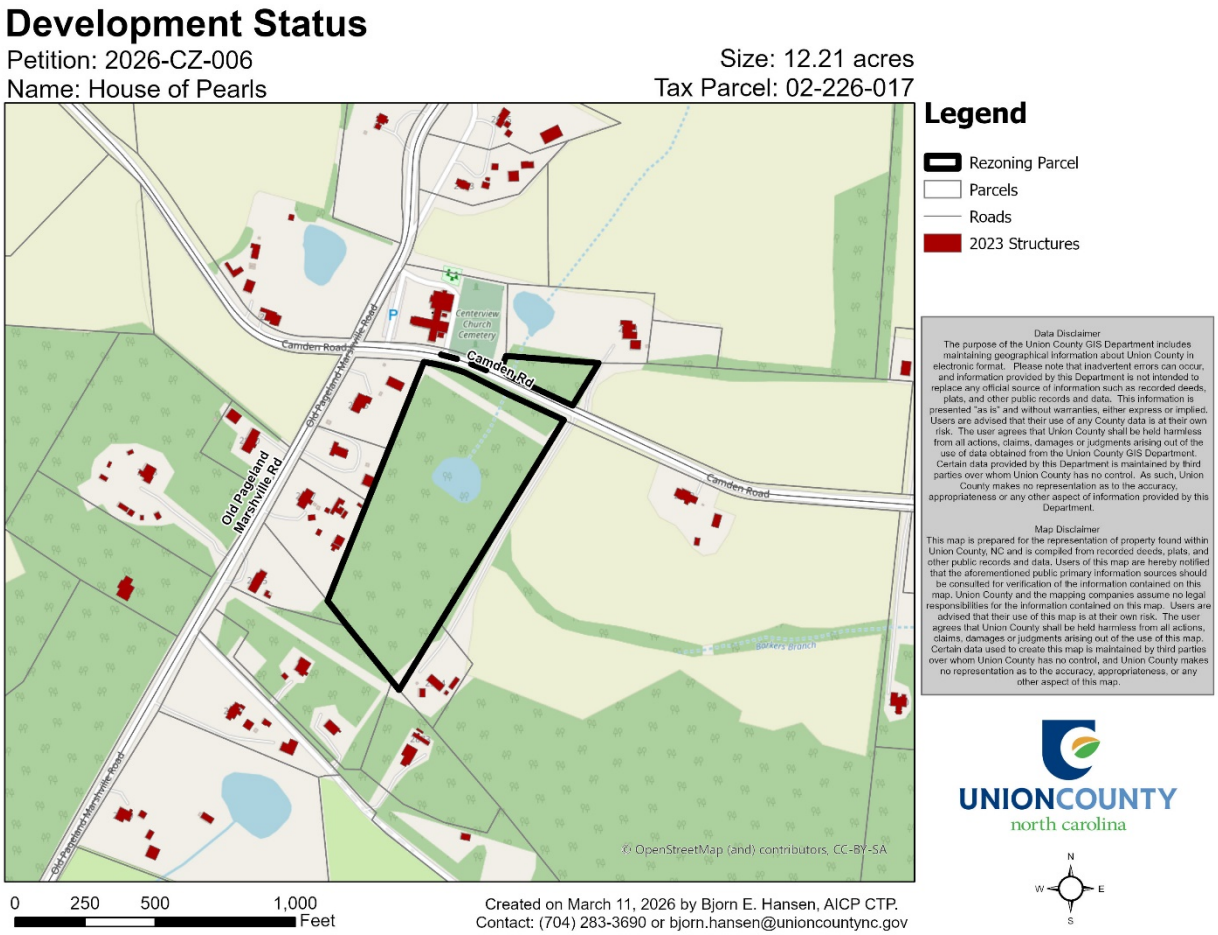
East of Site

Municipal Proximity

The site is approximately four miles south of Marshville and Wingate.

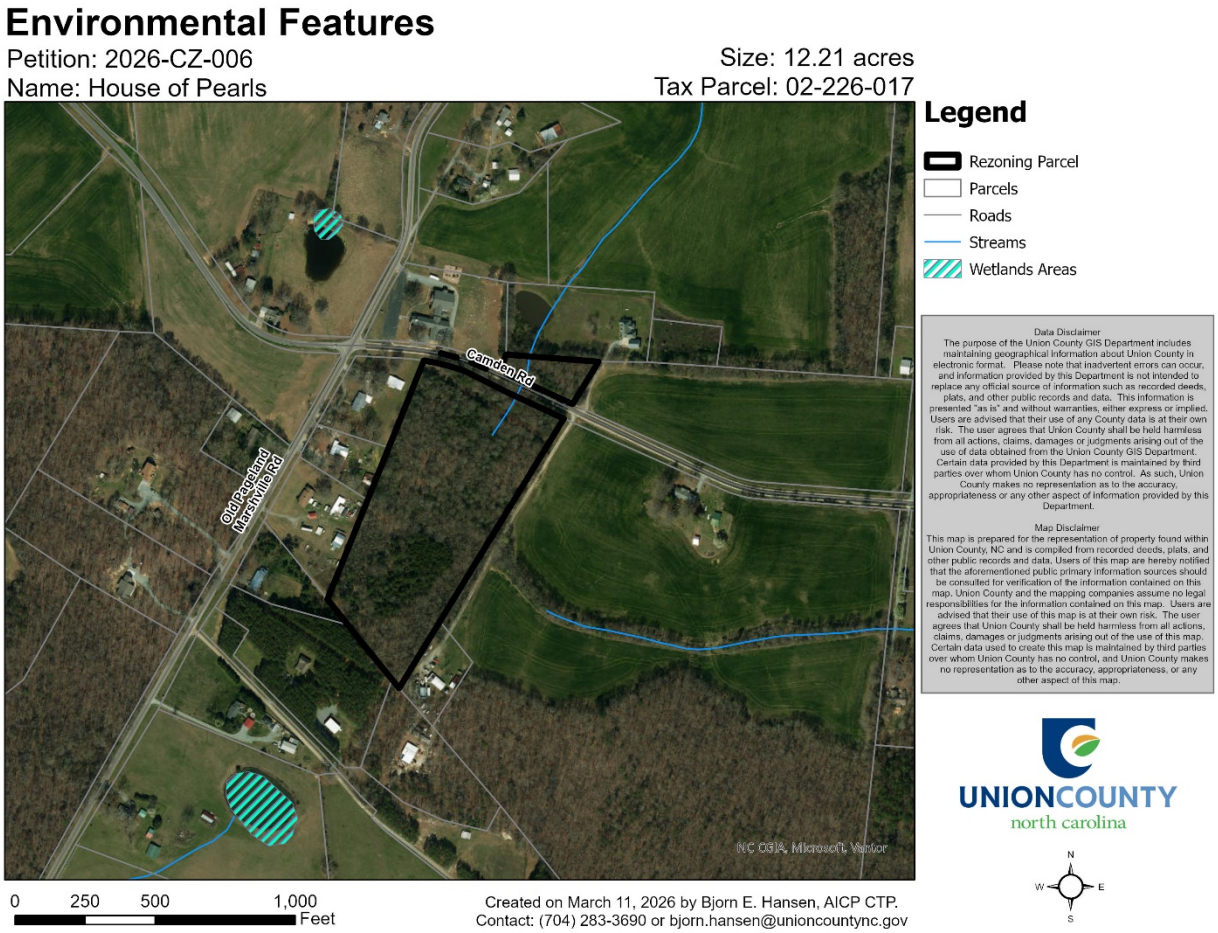
Existing Land Use and Development Status

The parcel is currently zoned RA-40 and is undeveloped and forested.



Environmental Features

There is a stream on the northern edge of the site that is incorporated into the stormwater pond. There are no other environmental features.

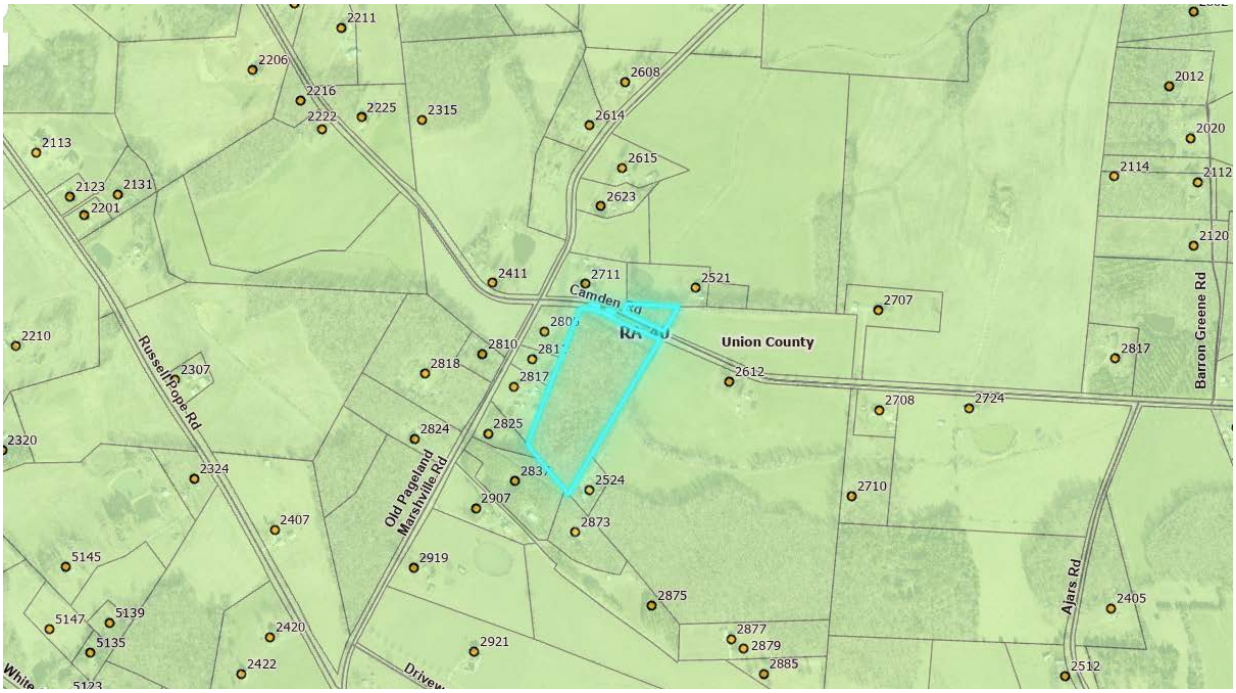


Utilities

Public water is available to the site with an extension from Old Pageland Marshville Road. The site will utilize an engineered septic system.

Zoning and Land Use History

There have been no proposed rezonings or special use permits on this site or in the immediate vicinity since zoning was implemented in Union County. The site is undeveloped.

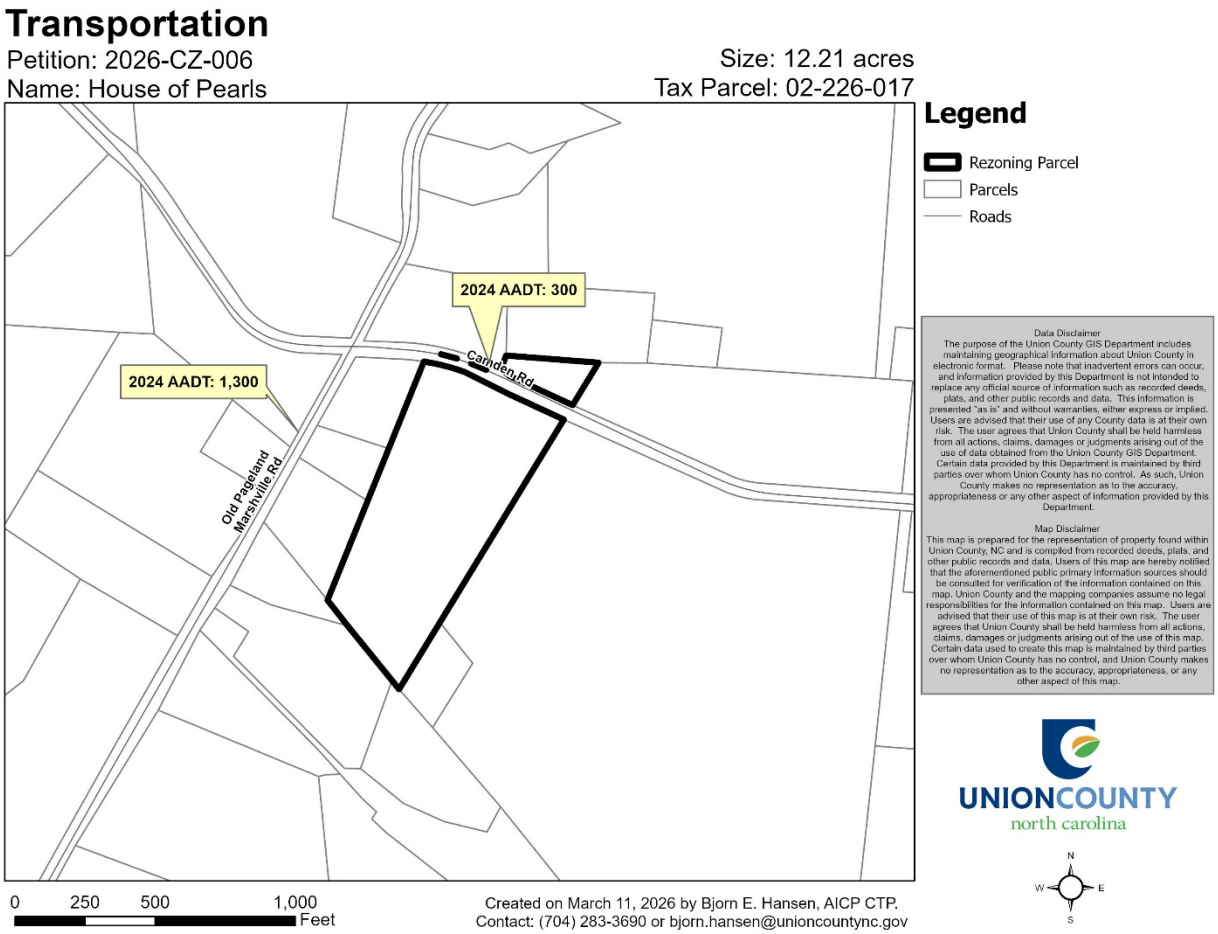


Schools

Because this rezoning request is commercial in nature, UCPS was not consulted for comments.

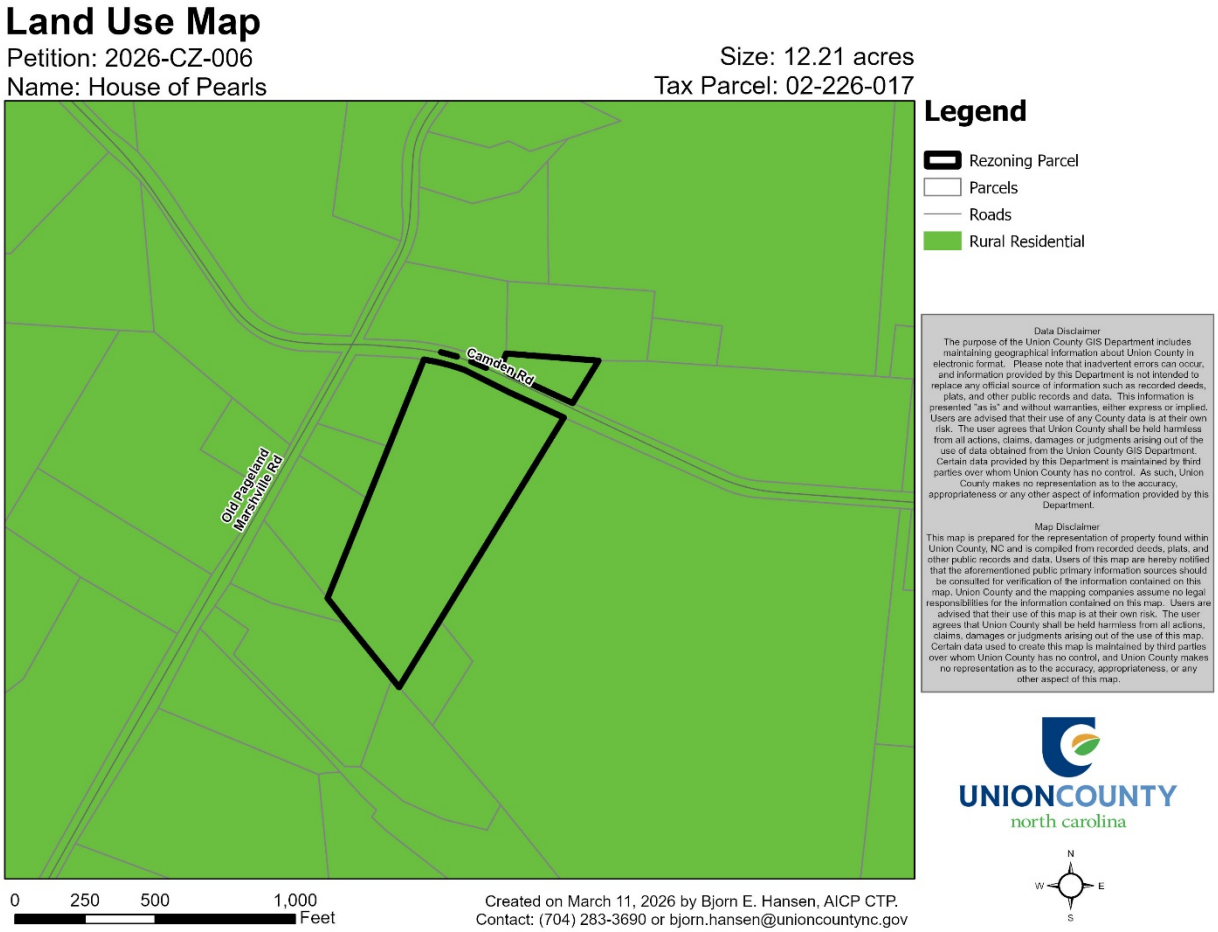
Transportation

This site is on Camden Road, which is a NCDOT-maintained facility. This section of Camden Road carries approximately 300 vehicles per day. There are no funded road improvement projects in the immediate vicinity of the rezoning. A traffic Impact Analysis (TIA) was not required for this rezoning. The anticipated traffic impact from this site is expected to be low.



Union County Comprehensive Plan

The Union County 2050 comprehensive plan identifies this area as Rural Residential. Group living facilities such as what is proposed in this rezoning are typically accommodated on RA-40 zoned properties through the special use permit (SUP) process.



Public and Municipal Comments

Public Comments

A community meeting was required and was held on March 31, 2026. A total of 19 residents attended the meeting and asked questions about fencing, signage, lighting, and stormwater impacts. No changes were made to the site plan as a result of the meeting.

A public hearing was conducted on May 18, 2026. Over one dozen people spoke in favor of the project, citing the effectiveness of the rehabilitation program, safe operations of the program's

other sites, and need in the community. One person, representing three residents, spoke in opposition, citing concerns over unsafe intersections, density, and safety.

Municipal Comments

Marshville and Wingate were not consulted due to the distance to their municipal limits.

Recommendations

Land Use Board

The Land Use Board evaluated this rezoning request at its April 21, 2026, meeting. The Board recommended approval on a 5-0 vote, citing consistency with the land use map.

Planning Department

This part of Union County is identified for rural residential and agricultural land uses. The proposed zoning is consistent with the adopted Plan because the use is typically allowed through the special use permit process. A SUP is not possible due to the phasing proposed for this facility – a new SUP would be required for every additional structure built one year after the SUP was granted. The proposed zoning district would provide flexibility for the owner and the proposed conditions limit future changes if the property is sold. The proposed use is therefore considered appropriate for the area. Because of these aspects of the development, staff recommend **approval** of this rezoning application.

Statements of Consistency and Reasonableness for Proposed Amendment to the Union County Zoning Map

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-006) and associated Master Planned Development Plan, submitted by Steve Merritt, requesting a revision of the Union County Zoning Map by rezoning an approximately 10.75 acre portion of one parcel of land totaling approximately 12.21 acres appearing on the tax map as tax parcel 02-226-017 along the south side of Camden Road from RA-40 to Master Planned Development and adoption of an associated Master Planned Development Plan.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLANS) (CZ-2026-006)

Pursuant to N.C.G.S. § 160D-605 and the Unified Development Ordinance of Union County, North Carolina (the "UDO"), the Union County Board of Commissioners (the "Board") does hereby find and determine that adoption of the proposed map amendment and associated Master Planned Development Plan ("MPD Plan") is consistent with the currently adopted Union County Comprehensive Plan (the "Comprehensive Plan"). The adoption of the proposed map amendment and associated MPD Plan (i) takes into account the need to amend the zoning map to meet the needs of the community, and (ii) is reasonable and in the public interest because:

1. The proposed use under the amendment and MPD Plan is consistent with the Comprehensive Plan. The Comprehensive Plan's Land Use Map identifies this area as Rural Residential. The Comprehensive Plan provides that Rural Residential areas are identified for agricultural and low-density residential development patterns. This map amendment and associated MPD Plan do not increase the density of development from an overall low density residential development.
2. The use, proposed rezoning, and associated MPD Plan comply with the standards for a Master Planned Development set forth in Section 20.020 of the UDO. The development would be difficult to carry out in the planned time frame otherwise under the applicable zoning regulations. It further provides greater public benefits than could be achieved using conventional zoning regulations. The proposed use under the rezoning and associated MPD Plan promotes, without limitation, flexibility and creativity in responding to changing social, economic, and market conditions through providing group home and recovery housing (which responds to changing social and economic conditions compared to many traditional housing models such as single-family housing).
3. The development will result in public benefits that are equal to or greater than those that would have resulted from development under conventional zoning (non-Master Planned Development) regulations. Specifically, the Master Planned Development proposed will provide a public benefit of allowing development of a group home that may provide a community service that would not be able to be developed in such a manner using conventional zoning regulations.

4. There are appropriate terms and conditions imposed to protect the interests of surrounding property owners and residents, existing and future residents of the Master Planned Development, and the general public. These conditions include, without limitation, agreement on adherence to a site plan that takes into account the impacts of the use and imposes conditions on the number of residents (which will reduce any impacts to neighboring properties).
5. Group home facilities are allowed in the existing zoning district, RA-40 under the UDO with a special use permit. However, utilizing the special use permit method under the UDO would require implementation within one year. This rezoning and associated MPD Plan would allow for flexibility to develop the property over a longer period in a manner that would otherwise already be allowed on the property through the special use permit process.
6. The use set forth under the conditions would meet Union County development standards.
7. The tract of land is not overly small for the general area in which it is located and is reasonable in size for the use contemplated.
8. The immediate surrounding properties are zoned for residential uses, which is similar to the use proposed under this rezoning and associated MPD Plan for a residential use as a group home.
9. The benefits to the community at large, the neighbors, and the property owners of the proposed rezoning outweigh any detriments to the neighbors and others caused by the rezoning. The benefits of this rezoning include increasing group living and recovery opportunities in Union County. The potential detriments of the use established by this rezoning include any increased noise, light, and traffic exposure resulting from the proposed use that could affect nearby properties.

CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE CURRENT PLANS) (CZ-2026-006)

Pursuant to N.C.G.S. § 160D-605 and the Unified Development Ordinance of Union County, North Carolina (the "UDO"), the Union County Board of Commissioners (the "Board") does hereby find and determine that the proposed map amendment and associated Master Planned Development Plan (the "MPD Plan") are inconsistent with the Union County Comprehensive Plan (the "Comprehensive Plan"), and that denial of the proposed map amendment and associated MPD Plan is reasonable and in the public interest because:

1. The proposed rezoning and associated MPD Plan could facilitate ongoing and potential future higher density group living uses in close proximity to existing residential uses. Higher density residential uses are inconsistent with low-density development contemplated for Rural Residential areas identified by the Comprehensive Plan (the proposed development is located in a Rural Residential area in the Comprehensive Plan).
2. Allowing group home use on the property could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is a noted concern in the Comprehensive Plan.
3. The proposed use under the amendment and the MPD Plan is also inconsistent with the Rural Land Use Plan as it could potentially allow for future higher-density residential development and other group homes in the area, which is identified as rural for purposes of the Rural Land Use Plan.
4. The use, proposed rezoning, and associated MPD Plan do not comply with the standards for a Master Planned Development set forth in Section 20.020 of the UDO. A group home development is allowed to be carried out in the existing zoning district with a special use permit; thus, it is not difficult or impossible to carry out such a group home development under the applicable zoning regulations. Given that a group home may be developed with the existing zoning with a special use permit, there would not be greater public benefits than could be achieved using conventional zoning regulations.
5. The terms and conditions proposed to be imposed do not sufficiently protect the interests of surrounding property owners and residents, existing and future residents of the Master Planned Development, and the general public. There could be additional restrictions imposed on the use and numbers of residents which would ensure such sufficient protection that are not set forth in the proposed rezoning and associated MPD Plan.

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2026-006)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the (CZ-2026-006) and associated Master Planned Development Plan, submitted by Steve Merritt, requesting a revision of the Union County Zoning Map by rezoning an approximately 10.75 acre portion of one parcel of land totaling approximately 12.21 acres appearing on the tax map as tax parcel 02-226-017 along the south side of Camden Road from RA-40 to Master Planned Development and adoption of an associated Master Planned Development Plan.

TO *APPROVE* THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion

(i) Adopt the Ordinance Approving Revision to the Official Zoning Map of Union County, North Carolina and the associated Master Planned Development Plan, and (ii) adopt the consistency and reasonableness statement for approval.

TO *DENY* THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion

(i) Deny rezoning petition CZ-2026-006 submitted by Steve Merritt and the associated Master Planned Development Plan; and (ii) adopt the consistency and reasonableness statement for denial.

ORDINANCE APPROVING REVISION TO THE OFFICIAL ZONING MAP OF UNION COUNTY, NORTH CAROLINA AND ASSOCIATED MASTER PLANNED DEVELOPMENT PLAN

WHEREAS, the Union County Board of County Commissioners (the "Board") heretofore enacted the "Unified Development Ordinance of Union County, North Carolina," including any amendments thereto (the "UDO") and the official Union County Zoning Map ("Zoning Map"); and

WHEREAS, Union County has received a rezoning petition (CZ-2026-006), submitted by Steve Merritt, requesting a revision of the Union County Zoning Map by rezoning an approximately 10.75 acre portion of one parcel of land totaling approximately 12.21 acres appearing on the tax map as tax parcel 02-226-017 along the south side of Camden Road from RA-40 to Master Planned Development (the "Rezoning Petition"); and

WHEREAS, there is also a request to adopt a Master Planned Development Plan associated with the Rezoning Petition ("MPD Plan"); and

WHEREAS, the Union County Land Use Board considered and made a recommendation concerning approval or denial of the Rezoning Petition and MPD Plan; and

WHEREAS, the Board has determined that approval of the Rezoning Petition and rezoning the subject parcel from RA-40 to Master Planned Development (MPD), along with approval of the MPD Plan, is reasonable and in the public interest, including for those reasons set forth in the contemporaneously adopted consistency and reasonableness statement.

NOW, THEREFORE, BE IT ORDAINED by the Union County Board of Commissioners as follows:

1. The Zoning Map is hereby amended by rezoning the 10.75 acre portion of the parcel appearing on the tax map as tax parcel 02-226-017 located along the south side of Camden Road from RA-40 to Master Planned Development (MPD).

2. The MPD Plan is hereby approved.

3. The conditions accepted by the Applicant are hereby approved and incorporated into the Master Planned Development (MPD) rezoning of the parcel.

4. The Board incorporates the considerations related to the Rezoning Petition and MPD Plan, as contemplated by Section 80.100 of the UDO, as set forth in the contemporaneously adopted consistency and reasonableness statement, into this ordinance by reference.

5. This ordinance is effective upon adoption.

Adopted this _____ day of _____, 2026.

_____
Brian Helms
Chair, Union County Board of Commissioners