



Union County, NC Board of Commissioners Meeting Minutes

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

Approved: March 17, 2025

Monday, February 3, 2025

6:00 PM

Board Room, First Floor

Closed Session - 5:15 PM

25-063 Closed Session

Present: Chair Melissa M. Merrell; Vice Chair Brian W. Helms; Commissioner Clancy C. Baucom; Commissioner Christina B. Helms; and Commissioner Gary Sides

Absent: None

At approximately 5:15 p.m., Chair Merrell called the February 3, 2025, regular meeting of the Union County Board of Commissioners to order.

Chair Merrell moved that the Board enter into closed session pursuant to G.S. 143-318.11:

- (a)(1), to prevent the disclosure of information that is privileged or confidential pursuant to G.S. section 153A-98;
- (a)(3), for attorney-client privilege; and
- (a)(6), to consider the qualifications, competence, performance, character, fitness, conditions of appointment, or conditions of initial employment of an individual public officer or employee or prospective public officer or employee; or to hear or investigate a complaint, charge, or grievance by or against an individual public officer or employee.

As such, the purposes are fully stated in the agenda for this meeting, which has been made publicly available.

The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Clancy C. Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Gary Sides	Aye

At the conclusion of the closed session and with the time being approximately 6:15 p.m., Chair Merrell moved that the Board end the closed session and return to the open session. The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Clancy C. Baucom	Aye
Commissioner Christina B. Helms	Aye
*Commissioner Gary Sides	Aye

*Commissioner Sides was out of the room at the time of the vote, and in accordance with Rule 23 of the Board's Rules of Procedure, his vote has been recorded in the affirmative.

At approximately 6:15 p.m., Chair Merrell moved that the Board take a recess to reconvene at 6:20 p.m. in the Board's meeting chamber. The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Clancy C. Baucom	Aye
Commissioner Christina B. Helms	Aye
*Commissioner Gary Sides	Aye

*Commissioner Sides was out of the room at the time of the vote, and in accordance with Rule 23 of the Board's Rules of Procedure, his vote has been recorded in the affirmative.

Opening of Meeting - 6:00 PM (6:20 p.m.)

At approximately 6:20 p.m., Chair Merrell called the February 3, 2025, regular meeting to order and welcomed everyone in attendance.

Invocation - Chair Melissa Merrell

Pledge of Allegiance – Chair Melissa Merrell led the body and the audience in reciting the Pledge of Allegiance to the flag of the United States of America.

Informal Comments

Chair Merrell stated that the next item on the agenda was informal comments from the community. The Chair read the guidelines for the informal comments and recognized Meredith Marr as the first speaker.

Ms. Marr stated that she resides in Indian Trail and is attending tonight's meeting along with John Thomison, who is also a resident of Union County.

She said that they are here tonight to introduce TreesUnion, which is a growing grassroots organization founded in 2023 with members across Union County, all of whom are dedicated to enhancing the area's tree canopy with the goal of improving residents' lives, health, safety, and quality of life.

Ms. Marr shared that the organization's strongest partnership is with Union County Public Schools, where they have already made a significant impact. She said that working closely with the schools' administrators and facilities' staff, they have planted 36 trees this past fall at

local elementary schools, creating better learning environments and safer playgrounds for generations of students. She stated they also planted trees on the Monroe Greenway. Ms. Marr shared that combined with the three tree plantings that they did this fall, they engaged over 100 parent and student volunteers at Stallings Elementary, Union Elementary, and the Monroe Greenway.

She shared that for fiscal year 2026, they are looking forward to expanding their impact through three key initiatives: planting 200 trees at Union County Public Schools (goal of reaching about 25 percent tree canopy coverage around the playground areas), distributing 1,000 seedlings at community and Arbor Day events, and providing 200 trees to neighborhoods with below average canopy coverage.

Ms. Marr stated that TreesUnion is able to dedicate over 97 percent of its funding and donations directly to tree plantings and distribution. She said they are able to do so by maintaining strong partnerships with local organizations, municipalities, businesses, and volunteers.

She said that they are seeking the Board's support to create a greener, healthier, and more prosperous Union County that maintains its natural character while accommodating growth.

Chair Merrell expressed appreciation to Ms. Marr for her presentation and said she was happy to learn about this organization.

In response to a question by Commissioner Baucom, Ms. Marr stated that they focus on native trees and want to diversify the tree canopy.

Chair Merrell said the Board looks forward to Ms. Marr returning and giving an update to the Board at a later time.

Katie Ryan said she is a resident of Stallings and is President of Spay/Neuter North Carolina and a leader of Change for Union County, which is a volunteer group that works hand-in-hand with Union County Animal Services. Ms. Ryan shared that their volunteers contribute over 3,000 hours to the local animal shelter. She spoke regarding animal welfare. She said they are advocating for common sense solutions, solutions that respect the traditions of a rural community while ensuring public safety and animal welfare. She requested that the Board establish an Animal Services Committee. She stated that the County's Animal Ordinances have not been updated since 1997. She said more animal control officers are needed.

Ms. Ryan stated the County has grown by 40 percent in the last 20 years, but the shelter has not grown with the county. She said in the last four years, shelter impoundments increased by 20 percent. She stated that an Animal Services Committee can help plan strategically to ensure that the shelter meets the needs of a growing county. Ms. Ryan said the County's investment in its own veterinarian was a great step.

She concluded by asking that the County award a community partner grant to the Humane Society of Union County, which operates the Monroe low-cost spay/neuter clinic. She suggested that County-funded affordable spay/neuter would help seniors, veterans, and limited-income families and drastically reduce the number of animals being abandoned and surrendered at the shelter.

The Chair called forward Kymberly Williams, who had registered to speak about animal welfare. Ms. Williams was not present.

Chair Merrell recognized Laura Sur as the next speaker.

Ms. Sur stated that she has been a Union County resident for 24 years and resides in Wingate, and for over 15 years of that time has been an animal welfare advocate. She said that she was present to second the request by Ms. Ryan to discuss having an Animal Services Committee. Ms. Sur said she wanted to highlight the critical issue of the urgent need for affordable spay/neuter services. She stated that the rising cost of veterinary care has made even low cost spay/neuter options inaccessible for many residents particularly for seniors, veterans, and families on limited incomes.

Ms. Sur also expressed appreciation for the County's funding the veterinarian at the shelter to do the spaying and neutering of the shelter animals and for the previous one-time funding to the Humane Society. She stated that since its inception in 2011 the Monroe low-cost spay/neuter clinic has performed over 44,250 spay and neuter surgeries.

She said that by establishing an Animal Services Committee and supporting affordable spay/neuter initiatives, the number of stray and abandoned animals can be reduced, ease the burden on an overcrowded shelter, and create safer neighborhoods for residents. She stated that with additional county funding, these services could be expanded, preventing thousands more unwanted animals from entering the shelter system.

April Thomason stated that she is a resident of Wingate and that she was present tonight on behalf of the House of Pearls, which is a non-profit. She described the House of Pearls as a one-year drug rehabilitation program for women who struggle with addictions.

Ms. Thomason said that the County's outdated animal ordinances have a direct impact on the House of Pearls' property. She described a situation where three female dogs were abandoned on their property that took up residency under their buildings. She said they called Animal Control Services for help, but the dogs were not considered dangerous, and Animal Control Services could not do anything. Ms. Thomason said the female dogs gave birth, and they had 17 dogs and puppies on their property. She stated they wanted to do the right thing, but the cost of spaying, neutering, and vaccinating 17 dogs was over \$5,000. She shared that the animal rescue community helped them.

Ms. Thomason stated her support of the request for an Animal Services Committee.

Todd Barber (member of Indian Trail Town Council) stated that he resides in Indian Trail. He said he was speaking tonight on his own accord and not on behalf of the staff of the Town of Indian Trail or the elected body.

He congratulated Commissioners Sides, Christina Helms, and Clancy Baucom on their successful election in November and congratulated Chair Merrell and Vice Chair Brian W. Helms on their election as Chair and Vice Chair.

Mr. Barber expressed appreciation to the County and its Parks and Recreation team for the ice skating rink in Indian Trail. He also expressed appreciation to Vice Chair Brian W. Helms for speaking before the Indian Trail Town Council regarding the Resolution concerning

Senate Bill 382. He said it has been placed on the Council's next agenda. Mr. Barber stated that he agrees with the County that a local municipality should be allowed to restrict high density residential zoning.

He said the County and the Town of Indian Trail worked together on putting in a water line in Emerald Woods in Indian Trail. He stated that there was the same situation in a neighborhood in Indian Trail in Moore's Park Community. He said he understood that the County had done the entire design for that project.

Mr. Barber said he understood that the County is setting up its own Economic Development Commission, and he thought it was a great idea. He stated that the Town of Indian Trail does not have an Economic Development position on staff nor does it have an Economic Development Board. He asked that the County consider allowing Indian Trail to have a presence in the new endeavor.

He commended the Board for exercising patience, fiscal constraint, and common sense in regards to expanding sewer capacity. He said that he appreciated the County expanding Twelve-Mile Creek Treatment Plant and other approved measures that will guarantee future business development in Indian Trail. Mr. Barber said he understood not a single project in Indian Trail was denied sewer last year, and there is still capacity.

He said that he would appreciate any efforts the Board can make to keep the taxes low with the upcoming revaluation. Mr. Barber stated that he liked for the County and town to have a great relationship. He said he thought the Board was a good working Board, and there are those who appreciate what the Board is doing.

Chair Merrell said that Mr. Barber and Mayor David Cohn have attended Board meetings several times over the last year. She expressed appreciation to the Town of Indian Trail for being a good partner with the County.

Chair Merrell announced that concluded the public comments and she called the next item on the agenda.

Public Hearing(s)

25-049 Public Hearing - Confidential Company (Project Nickel) to Consider a "STEP 4" Economic Development Incentive Grant in an Amount Not to Exceed \$2,350,000 Paid over a Five-Year Period

Chair Merrell opened the public hearing at approximately 6:45 p.m. and recognized Ron Mahle, Economic Development Director, for comments.

Mr. Mahle explained that typically when he brings a project to the Board for consideration of an economic development incentive grant award, the company is identified by name. He said tonight he is referring to this opportunity by the confidential code name "Project Nickel." He shared the reason why it was referred to by the confidential code name was that economic incentives are being pursued through the State of North Carolina when means, if awarded, the company name would be announced first by the Governor's Office. He said they expect to hear from the State regarding those incentives over the next two weeks.

He shared that the Economic Development Department started conversations with Project Nickel in the summer of 2024. Mr. Mahle shared that Rachel Holtzman, Assistant Economic Development Director, first became aware of this opportunity when attending the Farnborough Airshow in England this past summer. He stated that over the subsequent months, they learned the following details:

- Project Nickel is an existing Union County firm whose corporate headquarters is in another state.
- The Company produces very sophisticated products which are delivered to customers across the globe.
- Demand for its products has grown to a level where its current manufacturing capacity cannot keep up.
- The parent corporation operates another production facility in another state that produces the same products.
- To meet the current and expected future demand, it is necessary to construct a new 50,000 square foot processing facility and install the most sophisticated production equipment of its kind.
- Expected capital investment is \$100 million.
- In addition to the high level of investment, the project is expected to create 65 new full-time jobs paying an approximate annual wage of \$78,000. Mr. Mahle said this is a little over \$5 million each year in new wages.

He stated to enhance the business case to the company's leadership to locate this project in Union County, the Economic Development Office requests the following incentive: Project Nickel's \$100 million investment qualifies it for a standard STEP 4 Economic Development incentive grant in an amount not to exceed \$2,350,000 paid over a five-year period beginning FY 2028.

Mr. Mahle said that based on anticipated capital investments, the company would pay estimated ad valorem taxes of \$2,940,000 over the same grant period. He noted the actual tax revenues to the County will be based on the current tax rate applied to the assessed value of the investment each year after depreciation.

He stated that given the potential to secure this high level of capital investment and also secure the well-paying jobs, the staff of the Economic Development Department recommends the award of a STEP 4 Economic Development grant to Project Nickel in an amount not to exceed \$2,350,000 to help secure this \$100 million investment.

Chair Merrell announced that no speakers had registered to speak during the public hearing. She asked if there was anyone present tonight who had not registered to speak but wished to speak regarding this public hearing.

Joel Downs came forward to the podium and stated that he resides in Wesley Chapel. He stated that this is obviously a great opportunity for the County, and he thought the County should pursue it. He suggested that the incentive grant award would be contingent on the State also approving an incentive grant award. He said the project sounds like a great opportunity for the State and also the

County.

With there being no other persons wishing to address the Board during the public hearing, Chair Merrell closed the public hearing at approximately 6:51 p.m.

Staff Recognition

25-015 Recognize Lifesaver Award Recipient

Chair Merrell recognized Patrick Niland, Deputy County Manager, to present this item.

Mr. Niland shared that on October 3, 2024, Kenneth Prusiensky was running one of the Senior Nutrition Home Delivered meal routes and came upon a house that he noticed the door was ajar. He reached his head in the door and called out and could hear cries for help. Mr. Niland said an elderly gentleman in the house had fallen and had been there for approximately 24 hours.

He stated that Mr. Prusiensky was able to get inside, help the elderly gentlemen to become stabilized, call 911, and coordinate with his supervisor to contact the family.

Mr. Niland reminded that Mr. Prusiensky was recognized approximately one-year ago for a similar event where he performed the Heimlich maneuver to save someone from choking at one of the congregate meal sites.

Mr. Prusiensky shared that this is the sixth time that he has been involved in saving someone's life, beginning when he was aged 12.

Chair Merrell presented Mr. Prusiensky with a framed Certificate of Recognition.

25-65 Introduction of Jason May, Director of Budget & Grants Management

Clayton Voignier, Assistant County Manager, introduced Jason May, the new Director of Budget and Grants Management. He shared that Mr. May has over 20 years of experience in Local Government and most recently served as the Director of Budget and Strategic Planning for the City of Richmond, Virginia, where he managed a \$3 billion budget process, capital improvement program, and federal pandemic funding initiatives.

Mr. Voignier added that Mr. May also previously served in director and management roles in North Carolina local governments, including Burke County and the City of Kannapolis. He stated that Mr. May has a bachelor's degree from UNC Charlotte and a Master of Public Administration from Appalachian State University. He further stated that Mr. May has completed both the Senior Executive Institute at the Virginia Institute of Government and the Municipal and County Administration course at UNC School of Government.

Mr. Voignier shared that Mr. May is a certified local government budget and evaluation officer with the North Carolina Local Government Budget Association. He said the Board will be seeing more of Mr. May at the Board's planning retreat on February 12 and during the upcoming budget process.

Mr. May came forward and Chair Merrell welcomed him to Union County. She said he had two pluses; he is a 49er and a Mountaineer.

Consent Agenda

Chair Merrell announced the next item would be the consideration of the Consent Agenda and the Agenda.

Commissioner Sides asked about the process of setting up an Advisory Committee as had been requested with an Animal Advisory Committee.

Brian W. Matthews, County Manager, responded that it was rather simple. He stated that the Board would direct staff to create a structure for the advisory committee, and staff would look for existing similar bylaws and give the Board advice regarding the number of individuals who should serve. He said the positions on the advisory committee would be advertised for interest.

Commissioner Sides asked if the advisory committee would be relatively cost free.

Mr. Matthews stated that would be up to the Board and explained that some of the committees are unpaid, which are usually ad hoc committees and do not last for any period of time, and other committees such as the Land Use Board receive a stipend.

Commissioner Sides said that he would personally volunteer to serve as the Commissioner-Representative on such an advisory committee. He said he needed to discuss with his colleagues on the Board if there was interest in moving forward with establishing an Animal Services Advisory Committee.

Commissioner Christina B. Helms moved to approve the Consent Agenda and Business Agenda as published. The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

25-059 Grant Renewal – X-Ray Machine Maintenance

ACTION: Authorized the County Manager to 1) negotiate and execute an agreement 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.

The Union County Sheriff's Office has utilized the contractual services of Point Security, Inc for X-Ray Machine Maintenance since 2018. Point Security, Inc. has been effective and efficient in meeting these service needs, and the request is to continue this service for an additional one-year term. The Sheriff's Office will collaborate with Procurement to explore solicitation options near the end of the term.

The anticipated annual cost for this service is \$8,299.81 and is budgeted

accordingly for FY2025.

25-058 Grant Application – FY2026 Juvenile Crime Prevention Council (JCPC) Funding for Parenting Support and Nurturing Parenting Program

ACTION: Authorized 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 and budget funds as appropriate.

The Human Services Agency Division of Community Support and Outreach seeks approval to apply for FY2026 JCPC funding to support our Parenting Support and Nurturing Parenting (PSNP) program. The Agency received \$21,500 in JCPC funding for FY2024, \$17,000 in FY2025, and is requesting up to \$25,000 in additional JCPC funding for FY2025. Before receiving JCPC funds in FY2024, PSNP, in its 12th year under the administration by the County, was only available for at-risk parents of children birth to five due to stipulations on the funding through Alliance for Children. In FY2024 and FY2025, Union County received \$135,008 in Alliance for Children Smart Start Funding, which covers 1.5 FTE facilitators, program handbooks and assessment tools, as well as incentives for motivation, retention, & graduation of program clients. JCPC funding enables the county to serve families with children 6-17.

PSNP has the potential to impact local child maltreatment recidivism rates and affect the generational ripple outcomes on families. The program tracks parents who complete all sessions and successfully graduate, boasting a current success rate of 90.8 percent with a total of 410 parents who have completed the full 13-week program throughout PSNP's history. In 2015, research determined that the estimated per-victim cost of non-fatal child maltreatment in the country increased from \$210,012 (2010 USD), as reported in Fang *et al.*² in 2012, to \$830,928 (2015 USD). This updated figure considers the value per statistical life regarding child maltreatment mortality and the monetized quality-adjusted life years regarding child maltreatment morbidity. In FY2024, 33 Union County parents successfully completed the program and served 68 children aged 0-5. Parenting Support and Nurturing Parenting is a valuable investment that produces high returns for our children and community.

The \$25,000 requested from the JCPC grant requires a 30 percent in-kind local match that will be met using supervision time and associated overhead program rent.

25-038 Board of Equalization and Review – Appointment of Chair

ACTION: Appointed Dutch Hardison as Chair for the 2025 Board of Equalization and Review

In accordance with NCGS §105-322(a) the Board of Equalization and Review shall be composed of members of the Board of County Commissioners or their designees. By resolution, and in accordance with Session Law 1998-174,

Union County operates with a separately appointed Board of Equalization and Review requiring a chairman to be appointed for each annual appeal period.

25-039 Delinquent Tax Lien Advertisement

ACTION: Approved the request to advertise delinquent taxes as required by North Carolina General Statutes.

As required by NCGS 105-369, tax collectors are to submit a report of the amount of unpaid taxes constituting liens on real property. Per the statute, this report is to be delivered to the Commissioners in the month of February. The balance shown on the report for 2024 is the outstanding amount as of January 15, 2025. During the month of February, all accounts owing taxes included in this report will have received a second notice of taxes due. This notice also serves as the notification of the intent to advertise unpaid taxes remaining due at the end of February. Upon the approval of the initial report, any taxes remaining unpaid at the end of February will be advertised during the month of April in the paper of general circulation in Union County. A copy of the report is available for review in the Office of the Clerk to the Board of Commissioners located in the Union County Government Center at 500 North Main Street, Room 914, Monroe, NC.

The only financial impact will be the cost associated with printing the delinquent listing in a local newspaper. This amount is prorated across all the outstanding accounts and the fee is added to those accounts resulting in no associated cost to the County.

25-043 December 2024 NCVTS Motor Vehicle Tax Report

ACTION: Approved the December 2024 NCVTS Vehicle Tax Refund Report

The refunds included in this report represent adjustments made to tax bills that resulted in refunds of motor vehicle taxes paid under the Tax and Tag Together program operated jointly between the counties and the state (\$918.43 refund).



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															
CLEMENTS, KYLE CHARLES	CLEMENTS, KYLE CHARLES		3886 CHIDNEY WOOD TRL	3886 CHIDNEY WOOD TRAIL	INDIAN TRAIL, NC 28079	Adjustment >= \$100	0008997158	LFE3405	PENDING	954247623	Refund Generated due to adjustment on bill 0008997158-2024-2024-0000-00	Situation error	0000000000		000	TAX	\$0.00	\$0.00	\$0.00															
															000	TAX	\$71.05	\$0.00	\$71.05															
															200	TAX	(\$100.00)	\$0.00	(\$100.00)															
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)															
															023	TAX	\$19.66	\$0.00	\$19.66															
															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		\$132.28
KOLUBINSKY, LUCIA MERES	KOLUBINSKY, LUCIA MERES		3212 DUCK POINT DR		MONROE, NC 28118	Adjustment >= \$100	0001382318	CH65328	PENDING	054868370	Refund Generated due to adjustment on bill 0001382318-2024-2024-0000-00	Over Assessment	0000000000		001	TAX	(\$24.97)	\$0.00	(\$24.97)															
															200	TAX	(\$76.89)	\$0.00	(\$76.89)															
															003	TAX	(\$2.68)	\$0.00	(\$2.68)															
															005	TAX	(\$0.60)	\$0.00	(\$0.60)															
															004	TAX	(\$4.46)	\$0.00	(\$4.46)															
															002	TAX	(\$17.26)	\$0.00	(\$17.26)															
																																Refund		\$66.86
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															026	TAX	(\$20.56)	\$0.00	(\$20.56)															
															003	TAX	(\$10.36)	\$0.00	(\$10.36)															
PANTO, ANDREW SCOTT	PANTO, ANDREW SCOTT		9587 BLACKHOLD CIR		WOUW, NC 28173	Adjustment >= \$100	0001882179	WU1000Y	PENDING	052686636	Refund Generated due to adjustment on bill 0001882179-2024-2024-0000-00	Exempt Property	12/2/2024		001	TAX	(\$96.61)	\$0.00	(\$96.61)															
															026	TAX	(\$20.56)	\$0.00	(\$20.56)															
															003	TAX	(\$10.36)	\$0.00	(\$10.36)															
															005	TAX	(\$2.11)	\$0.00	(\$2.11)															
															004	TAX	(\$17.28)	\$0.00	(\$17.28)															
															002	TAX	(\$221.51)	\$0.00	(\$221.51)															
																																Refund		\$379.08
															001	TAX	(\$62.63)	\$0.00	(\$62.63)															
															015	TAX	(\$21.25)	\$0.00	(\$21.25)															
															003	TAX	(\$6.74)	\$0.00	(\$6.74)															
SWIDER, JONATHAN STRATTON	SWIDER, JONATHAN STRATTON	SWIDER, JESSICA RENEE LN	1404 HALLORY LN		WOUW, NC 28173	Adjustment >= \$100	0000922491	87T1877	PENDING	055856156	Refund Generated due to adjustment on bill 0000922491-2024-2024-0000-00	Adjustment	0000000000		001	TAX	(\$62.63)	\$0.00	(\$62.63)															
															015	TAX	(\$21.25)	\$0.00	(\$21.25)															
															003	TAX	(\$6.74)	\$0.00	(\$6.74)															
															005	TAX	(\$1.50)	\$0.00	(\$1.50)															
															004	TAX	(\$11.24)	\$0.00	(\$11.24)															
															002	TAX	(\$144.87)	\$0.00	(\$144.87)															
																																Refund		\$605.43
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25-052 Contract Renewal – Skip Tracing Services

ACTION: Authorized the County Manager to 1) negotiate and execute an agreement 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.

The Tax Administration Department has utilized the contractual services of TransUnion Risk and Alternative Data Solutions, Inc. for skip tracing since 2017. The contractor has been effective and efficient in meeting these service needs, and the request is to continue this service for an additional one year. The Department will work with Procurement to explore solicitation options near the end of the term.

The anticipated annual cost for this service is \$7,500.00 and is budgeted accordingly for FY25.

25-051 Appointment of Deputy Finance Officer

ACTION: Appointed John Buchanan, Assistant Finance Director, to serve as a "Deputy Finance Officer" in order to pre-audit obligations

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.

25-066 Financing Letter – Lanes Creek Volunteer Fire Department

ACTION: Authorized Board Chair to sign letter

Lanes Creek Volunteer Fire Department, Inc. (the "Fire Department") desires to construct a new fire station. The Fire Department desires to issue certain tax-exempt bonds in order to finance the project. In order for the Fire Department to issue such tax-exempt bonds for the project, the Internal Revenue Code requires a public hearing and approval of the governing body of the political subdivision where the project is located. Such approval does not make Union County liable for repayment of the debt, it does not constitute a debt of Union County, and it does not implicate the taxing powers of the County.

Based on Board action during the January 6, 2025 Regular Meeting, the Fire Department held a public hearing. As part of the financing documents, the bank requires a letter from Union County, signed by the chair, stating that Lanes Creek is allowed to provide fire service in Union County, they are in good standing, the fire tax district supports fire operations, and that the department has made the county aware of this financing agreement.

February 3, 2025

HomeTrust Bank
PO Box 10
Asheville, NC 28002-0010

Re: Municipal Lease and Option Agreement between HomeTrust Bank and Lanes Creek Volunteer Fire Department, Inc.

I am Chairman of the County Commissioners of Union County. This letter is to advise you that: Lanes Creek Volunteer Fire Department, Inc. is a qualified Volunteer Fire Department, assigned to protect a specific Fire District within this County.

In addition, a special ad valorem (fire tax) is assessed on the real property owners of this district. Said tax is to be used exclusively to provide equipment, facilities, and training as is necessary to provide fire protection for said district. Said funds may also be used to upgrade equipment as the need arises. This tax is collected by the County and disbursed by the Finance Office to the Fire Department on a regular basis by the County Finance Officer. The Fire Department is operated and managed by the Board of Directors of the Fire Department and the Officers of said Department. The Department is currently meeting the requirements of their fire service contract.

The Fire Department has made us aware of their intention to acquire new capital assets through a Lease Purchase transaction with your firm. Please be advised that the County has no objection to this transaction.

Sincerely,


Melissa Merrell
Chair, Union County Board of Commissioners

Union County Board of Commissioners
500 North Main Street Monroe, NC 28112

unioncountync.gov

25-057 Minutes for Approval

ACTION: Approved minutes of the regular meeting of October 7, 2024

Information Only

25-035 Contract Report October - December 2024

ACTION: No action was requested. This item was for Information Only.

Per Section XVIII of the FY 2025 adopted Operating and Capital Budget Ordinance, the contract report lists executed contracts and purchase orders that were entered into by the County Manager or Procurement designee from October through December 2024.

See Exhibit "A" attached hereto and incorporated herein by reference.

25-040 Tax Collector's Departmental Report for December 2024

ACTION: No action is requested. This item was for Information Only.

This report reflects the totals of all tax transactions within the Tax Collector's Office for the month of December 2024 as required by NCGS 105-350(7).

To: Board of County Commissioners
Brian Matthews, County Manager
Lynn West, Clerk to the Board

From: Vann Harrell
Tax Administrator

Date: January 14, 2025

Re: Departmental Monthly Report

The Tax Collector's monthly/year to date collections report for the month ending December 31, 2024 is attached for your information and review.

Should you desire additional information, I will provide that at your request.

Attachment

VH/JM

Tax Administration | Revenue Division

500 N. Main St., Suite 119
Monroe, NC 28112

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**DECEMBER 2024
PERCENTAGE FOR REGULAR TAX**

DECEMBER 31, 2024 REGULAR TAX	2024	2023	2022	2021
BEGINNING CHARGE	237,348,222.63	226,150,705.22	216,977,421.29	208,186,255.04
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES	403.66			
NON DISCOVERIES	3,720.75	3,462.89	3,462.89	3,458.64
RELEASES	(90,599.28)	(522.37)	(250.64)	(94.85)
TOTAL CHARGE	237,261,747.76	226,153,645.74	216,980,633.54	208,189,618.83
BEGINNING COLLECTIONS	149,186,919.75	225,982,495.45	216,869,852.91	208,102,253.98
COLLECTIONS	45,300,315.68	20,040.30	15,971.84	14,900.99
TOTAL COLLECTIONS	194,487,235.43	226,002,535.75	216,885,824.75	208,117,154.97
BALANCE OUTSTANDING	42,774,512.33	151,109.99	94,808.79	72,463.86
PERCENTAGE OF REGULAR	81.97%	99.93%	99.96%	99.97%
OVERALL CHARGED	237,261,747.76	226,153,645.74	216,980,633.54	208,189,618.83
OVERALL COLLECTED	194,487,235.43	226,002,535.75	216,885,824.75	208,117,154.97
OVERALL PERCENTAGE	81.97%	99.93%	99.96%	99.97%

**DECEMBER 2024
PERCENTAGE FOR REGULAR TAX**

DECEMBER 31, 2024 REGULAR TAX	2020	2019	2018	2017
BEGINNING CHARGE	192,183,069.46	186,540,147.30	180,717,811.44	186,663,147.61
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES				
NON DISCOVERIES				
RELEASES	(10.07)			
TOTAL CHARGE	192,183,059.39	186,540,147.30	180,717,811.44	186,663,147.61
BEGINNING COLLECTIONS	192,103,628.50	186,438,129.73	180,656,545.07	186,613,670.32
COLLECTIONS	1,281.84	652.00	473.03	490.48
TOTAL COLLECTIONS	192,104,910.34	186,438,781.73	180,657,018.10	186,614,160.80
BALANCE OUTSTANDING	78,149.05	101,365.57	60,793.34	48,986.81
PERCENTAGE OF REGULAR	99.96%	99.95%	99.97%	99.97%
OVERALL CHARGED	192,183,059.39	186,540,147.30	180,717,811.44	186,663,147.61
OVERALL COLLECTED	192,104,910.34	186,438,781.73	180,657,018.10	186,614,160.80
OVERALL PERCENTAGE	99.96%	99.95%	99.97%	99.97%

**DECEMBER 2024
PERCENTAGE FOR REGULAR TAX**

DECEMBER 31, 2024 REGULAR TAX	2016	2015
BEGINNING CHARGE	176,859,604.37	174,193,635.20
TAX CHARGE		
PUBLIC UTILITIES CHARGE		
DISCOVERIES		
NON DISCOVERIES		
RELEASES		
TOTAL CHARGE	176,859,604.37	174,193,635.20
BEGINNING COLLECTIONS	176,818,351.69	174,171,778.91
COLLECTIONS	454.82	461.80
TOTAL COLLECTIONS	176,818,806.51	174,172,240.71
BALANCE OUTSTANDING	40,797.86	21,394.49
PERCENTAGE OF REGULAR	99.98%	99.99%
OVERALL CHARGED	176,859,604.37	174,193,635.20
OVERALL COLLECTED	176,818,806.51	174,172,240.71
OVERALL PERCENTAGE	99.98%	99.99%

25-054

Tax Refunds, Releases and Prorations Approved by Finance Officer

ACTION: No action was requested. This item was for information only.

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 report marked as Exhibit "B" to these minutes is for December 2024 NCVTS releases and refunds less than \$100 and prorations

approved by the finance officer.

See Exhibit “B” attached hereto and incorporated herein by reference.

Business

25-059

Consider a “STEP 4” Economic Development Incentive Grant for Confidential Company (Project Nickel) in an Amount Not to Exceed \$2,350,000 over a Five-Year period

Chair Merrell recognized Ron Mahle, Economic Development Director, for his comments.

Mr. Mahle offered to answer any questions of the Commissioners.

With there being no questions from the Commissioners, Vice Chair Brian W. Helms moved to: 1) award a “STEP 4” Economic Development incentive Grant in an amount not to exceed \$2,350,000 over a five-year period and 2) authorize the County Manager to negotiate and execute an agreement substantially consistent with this agenda item.

The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

25-055 Union County Jail Study Update

Chair Merrell recognized Chris Boyd, Facilities and Fleet Management, Director, to introduce this item.

Mr. Boyd stated that the Board gave direction to the County Manager and the leadership team last year to begin to update the statistics and data and ultimately the bed count estimates and projections for a potential new jail. He explained that tonight’s update will include discussions about the study’s process, the process followed by the design team, data collected, and an analysis of that data. He said the Board would see a focus on two projections, the first is where no changes are expected or planned in the current justice system process, and a second projection that anticipates an increase in future bookings.

Mr. Boyd pointed out that this information in the update is only a portion of the total study, and in order to move forward with the remainder of the study, Board direction is needed in a future meeting. He said that he will also be sharing some next steps for Union County specifically, focused on the retreat on February 12. Mr. Boyd stated the Board is not being asked to take any action tonight.

He introduced Alan Richardson and Dr. Patrick Jablonski with Justice Planners. He said that Mr. Richardson and Dr. Jablonski are subject matter experts in detention center and prison planning.

Mr. Richardson stated that Little Architect and Hemphill-Randel will be doing the design later in the project. He said he started as a corrections officer over 35 years ago and worked most every position in a county jail to facility commander. Mr. Richardson shared that he had the opportunity to work on staff with the National Institute of Corrections before he started providing private consulting. He stated that since 2018, Justice Planners has had the opportunity to complete 30 detention center assessments and 19 detention and prison master plans. He introduced Patrick Jablonski, Ph. D.

Mr. Richardson explained the purpose of the needs assessment portion of the study is to analyze the data from the local criminal justice system from the jail and to be able to synthesize it to determine the future inmate population and bed space needs for Union County. He described their process included interviewing a number of the key stakeholders in the local criminal justice system, using the information to create a forensic reconstruction of the facility's data, developing an analysis that depicts the future size of the population, and developing forecast scenarios that illustrate a range of options.

Vice Chair Brian W. Helms asked who the key stakeholders were who were interviewed by his firm.

Mr. Richardson responded that it included persons from the jail, the Sheriff's Office, local law enforcement, courts, prosecuting attorney, defense attorneys, local magistrate, etc.

Vice Chair Brian W. Helms stated that he thought it was important to understand who the key stakeholders who were interviewed and polled with this study. He said that, obviously, the Commissioners have to represent the most important stakeholders which are the taxpayers of Union County. He asked Mr. Richardson if he was correct in saying that the team interviewed essentially the Sheriff's Office, jail, courts, judicial, and magistrates.

Mr. Richardson said that he could access that list and provide the exact stakeholders. He recognized Dr. Patrick Jablonski to present data analysis.

Dr. Jablonski said that this was a fairly complex study with a number of moving pieces. He shared that they begin the study by trying to get a feel for the context of the community, and said from the beginning the incredible growth over Union County over time and what is expected in the future has dictated much of the discussion that has been seen this evening. He stressed the importance of the growth to their projections but noted there are other pieces to the projections that go beyond the growth.

Dr. Jablonski said they begin with the Projected Adult Population component of the community to 2050. He shared that they downloaded data from the North Carolina State Demographer's Office. He stated that if they were to look at the overall County growth at 64 percent across the next quarter of a century, it would include children and senior citizens who are not necessarily coming to the jail operations, so they looked at the adult population. He noted they looked at the male population when they built their projection scenarios, because they are approximately 85 percent of the jail population. He said it does have an impact on the bookings forecast in the future.

He stated the average daily population of the jail from seven years ago has peaks and valleys. Dr. Jablonski noted the impact of COVID in 2020, and said the population recovered very quickly from COVID and then dropped again and then went back up. He said from 2022 forward the jail's population in Union County is really artificially constrained because of the capacity problem. He stated there were many more individuals who ought to be coming to jail who are not necessarily coming to jail at least in the view of the key stakeholders. He said that when they review the numbers, they see that as well. Dr. Jablonski stated when the data is broken into monthly amounts, they see that despite the capacity constraints on the jail, the number of individuals for which the County is responsible increases. He explained that the number of individuals who have a violent felony charge has increased over time such that there is really no choice in terms of holding these individuals. Dr. Jablonski said the Sheriff's Office is in the position of not only having to house these individuals but also housing them in other places as well. He stated the type of inmate coming into the facility has changed qualitatively. He said it is a much more serious population than it was seven years ago.

Vice Chair Brian W. Helms interjected that he had some questions. He stated that Dr. Jablonski was correct there have been many projections. The Vice Chair asked Dr. Jablonski if he received the population data from the North Carolina Demographer's Office, which Dr. Jablonski acknowledged was correct. Vice Chair Brian W. Helms asked the source from which that office receives its data.

Dr. Jablonski responded that he did not know.

Brian W. Matthews, County Manager, responded that typically that the past data information comes from the county, and then the Demographer's Office makes estimates on its own.

The Vice Chair explained the reason he asked the question was because lately there have been a number of studies regarding population growth, one of which was recently published by The Charlotte Business Alliance. He shared that the organization published that it anticipates a 50 percent growth in the Greater Charlotte area. He said he thought it was important to understand that organizations such as The Charlotte Business Alliance are funded typically by other members that rely on growth for revenue. He commented that he thought it should be taken at face value but understand that there are other intricacies involved with other data or statistics received on growth.

Vice Chair Brian W. Helms said that Dr. Jablonski made the comment that insinuates that there would be more arrests if there were more beds. He asked Dr. Jablonski if that was correct.

Dr. Jablonski replied "yes, sir."

The Vice Chair asked if that was information that had been received from the key stakeholders, which Dr. Jablonski also answered affirmatively. Vice Chair Brian W. Helms asked who the stakeholders would be.

Dr. Jablonski replied "law enforcement agencies to include the Sheriff's Office, Wingate Police Department, and Monroe Police Department."

The Vice Chair continued his questions by asking if Dr. Jablonski was saying that local law enforcement is saying that individuals are not being arrested because of bed space.

Dr. Jablonski replied "correct."

Vice Chair Brian W. Helms asked if potential violent offenders are being allowed to be let go because there is no bed space.

Dr. Jablonski said he did not say it about violent offenders. He explained that what he was saying is what they are seeing is a shift in arrest processes such that there are operations that the Sheriff's Office, for example, conducted as a matter of course such as drivers' license check and driving under the influence checkpoints seven years ago that they have to seriously reduce now, because they do not have the bed space.

Chair Merrell stated if her memory was correct, the Board had been told in previous presentations that weekenders, for example, who are supposed to check themselves in on the weekend, if there was not bed space, might be sent home. She asked if the Board had not also been told that the County has a contract with Cabarrus County or someone else for a daily fee would house some of the inmates for Union County.

Mr. Matthews responded that Union County has a loose agreement with Cabarrus County, which means when Union is over the jail population, it will house some of the inmates for Union County and house them at a cost that Union County pays.

Chair Merrell asked if the County is still using that agreement.

Mr. Matthews responded that it is and added that it depends on the circumstances of whether the County is above its jail population count. He added that if major repairs are taking place at the jail and some of the inmates have to be moved because of the repairs, then the agreement would be used as well.

Vice Chair Brian W. Helms asked Dr. Jablonski if it were his understanding that there is a directive that the arrests have to be limited because of not having jail space.

Dr. Jablonski replied that he was not sure about the term directive. He said they heard fairly consistently from the stakeholders that there is an artificial suppression on the number of individuals who get booked into the facility due to the capacity situation.

Vice Chair Brian W. Helms asked if it was Dr. Jablonski's assumption that if there was more bed space available, there could be additional arrests.

Dr. Jablonski responded, "yes, sir."

Commissioner Christina B. Helms asked if there was completed data for the year-to-date for the ADP (average daily population).

Dr. Jablonski responded that it is complete through the end of September 2024. He said they received their data from the Sheriff's Office in early October, and

the analysis was conducted in early October.

Commissioner Sides referred to the projection of 64 percent overall growth between now and 2050. He asked about the reasonable expectation of the life of a new jail facility. He said he assumed the growth projection is part of the formula that is being used to project the bed size of a new facility.

Alan Richardson responded that there is no hard rule for the life expectancy for a detention center. He suggested a rule of thumb is 30 years. He added that it depends on how well it is built and how well it is maintained. He said that typically a jail will age approximately three and a half times faster than a typical County building because it operates 24 hours a day/seven days a week, and there is a lot of wear and tear on the facility. He added that when it becomes crowded, and two offenders are placed in the space designed for one, the facility will age much faster.

Mr. Richardson addressed population projections, stating that when looking at these projections 20 to 30 years into the future, the reliability factor begins to deteriorate.

Commissioner Sides stated that obviously the recession of 2008 or the Pandemic did not have a long-term effect on the population growth. He asked if there were any events that could be foreseen between now and 2050 or the next 30 years that might impact the growth rate.

Dr. Jablonski said any number of events could impact the growth rate such as another Pandemic or massive public policy change.

Commissioner Sides said those events along those lines from the past have not had a long-term effect on the trajectory of growth.

Dr. Jablonski said that it has not had a long-term effect on the free world growth, but in terms of the correctional population, it is a bit unique for Union County, because it is constrained by capacity. He estimated that in approximately 90 percent of the projects in the communities in which they work, they have seen post-Pandemic that the jail populations have not fully risen to where they were on a pre-Pandemic basis. He explained that, typically, the individuals who have less serious matters and violence were released more in 2020 and 2021, and because they have capacity, those populations have stayed lower than they were on a pre-pandemic basis. He noted that was not the case in Union County, because the County was short of jail space well before the pandemic.

Commissioner Sides described it as an artificial bottleneck in the system that may skew the numbers as it begins to bump up to the ceiling.

Dr. Jablonski addressed the average daily bookings and average length of stay for Union County on a historical basis.

He displayed a graph showing the average daily bookings and average length of stay. He said they marched well together for approximately a five-year period. He further said the more people brought to a correctional facility, in general, the average daily population will go up. He said bookings would increase substantially if more beds came online.

Dr. Jablonski addressed the average length of stay. He explained that the population uptick in 2024 is due mostly to an average length of stay increase, which he said has its roots in the type of individuals who are coming to the jail when compared to 2018. He stated that in comparing these individuals coming to the jail in 2018, the proportionate number of individuals facing a violent felony charge has risen significantly. Dr. Jablonski said these are individuals whom law enforcement cannot ignore and who, in the interest of public safety, have to come to the jail, which places a burden on determining housing for non-violent individuals.

He stated the County's criminal justice system is excellent compared to most everywhere they have worked in terms of the front-end processing. He described the system as being extremely efficient and commended the County for funding positions to work in the District Attorney's Office and particularly to review cases is extremely smart strategically.

Commissioner Sides asked if there are any bottlenecks that can be addressed in the judicial process; for example, is there a sufficient number of judges that are creating an artificial bottleneck and that is why the average length of stay is increasing.

Dr. Jablonski responded that in their conversations with stakeholders, there were indications of needing another judge or two. He said they did not acquire criminal court case processing data for this project. He also said they tried to obtain that information in areas where they work, but they were unable to obtain that data from the State for this project.

He stated that he felt good about the criminal justice system because a lot of the questions are being addressed. He shared that they had a good visit with the judiciary, where some good ideas are taking shape, such as changes with the software system that were implemented not long ago. Dr. Jablonski said the problem is it is being swamped by an increasing number of people, and many of the matters facing those individuals are much more serious than they were a decade ago.

Vice Chair Brian W. Helms said there is almost an insinuation that there may be a bottleneck on the backend of the processing or in the court system. He asked if there might be some truth to that from what Dr. Jablonski's firm found.

Dr. Jablonski responded, "absolutely." He added that after having conducted the study, he felt good about the process in Union County. He said what he would love to see is more managing of the data.

Commissioner Sides asked if the data could be obtained locally.

Dr. Jablonski commented that they tried two to three methods to obtain the data, and they reached the person, asked, and explained the nature of the project but could not obtain the data.

Vice Chair Brian W. Helms asked if it was a safe assumption that the criminal court data would be a smoking gun to identify other potential bottlenecks in the system.

Dr. Jablonski responded, "yes, sir."

Commissioner Sides commented that it sounds like an important piece of data for possible improvements not just to the jail but the whole judicial process.

Dr. Jablonski clarified that there are general criminal justice processing numbers that are publicly available. He said the response from the State Courts was to view the Courts' website. He explained that what he thought sets Justice Planners apart is that it reviews raw data, and so they were asking for every criminal motion in every criminal matter allowing, it to do "big data" and crunch the numbers.

Commissioner Sides questioned if the reason given for not being able to obtain the data was for security purposes or privacy or if they did not have the data.

Dr. Jablonski commented that he did not believe the staff involved at the State level wanted to set the precedent of releasing raw data to researchers for those purposes.

Vice Chair Brian W. Helms asked that the Board be privy to the information who was contacted for release of the data.

Dr. Jablonski said he did not remember the name of the person at the State who was contacted, but he had taken good notes. He added that the conversations took place in early October. In response to a previous question by Commissioner Christina Helms about the study ending in September, Dr. Jablonski said they, as well as Union County staff, worked hard to try to secure that court data so they could finish the analysis. He further said they worked through much of September, the month of October, and as he recalled into November before they were given the hard "no."

Dr. Jablonski presented his forecast if there are no changes in the criminal justice system from the time that the data was collected at the end of September 2024. He noted that the forecast was based on multiple projected simulations of bookings, average length of stay, and the prior history of the jail's average daily population. He pointed out that the bookings were modeled in part using the growth curve from the State Demographer's Office. He said they also reviewed arrest patterns and tried to look at crime rate, which is not a good predictor anywhere, because of problems with crime data on a national level, and average length of stay was modeled independently.

Dr. Jablonski said they built approximately 15,000 simulations of the future for Union County and selected the one that was the best fit for the data. He reviewed their assumption, if nothing changes, bookings will double over time from 15 to 30 per day. He said the average length of stay will move from its current level of just over two weeks to approximately 22 days. He stated that despite the efforts to control the average length of stay, inevitably, those efforts will be subsumed by the growing seriousness of the charges that the individuals face. He stated the bottom line is by 2050 the average daily population is expected to be 657 individuals for which Union County is responsible. He said the facility does not have the space for 657 individuals, but the pressure will exist to house 657 individuals if there are no changes in the system. He said that is just the number of humans on an average daily basis and stated that the required size of the facility requires discussion of a couple of factors. He stated that there are two factors that have to be taken into account:

1. Forecasts are an average daily population. He said there are days of the week and hours of the day and times of the year where the population pressure is larger on the jail facility. Dr. Jablonski said that the peaking factor has to be taken into account. He stated that they supplied a peaking factor of 16.1 percent for females and 8.6 percent for males.
2. He stated the second factor is an operational factor or the classification factor. Dr. Jablonski explained that the jail needs internal capacity to move individuals around, to keep individuals separate from each other.

He reviewed the following slide:

Union County Primary Forecast – Bed Need

	Females				Males				Total ADP	Total Bed Need
	ADP	Peaking (16.1%)	Classification (15%)	Bed Need	ADP	Peaking (8.6%)	Classification (15%)	Bed Need		
2030	58	9	9	76	291	25	44	360	349	435
2035	74	12	11	97	351	30	53	434	425	531
2040	92	15	14	120	411	35	62	508	503	628
2045	111	18	17	145	469	40	70	580	580	725
2050	131	21	20	172	526	45	79	650	657	822

- The forecast indicates that by 2050, 822 beds are necessary to safely house 657 detainees.
- Note the increase in the female population is projected to be higher/faster than the male population (20% in 2050 vs. 16% now).
- **Remember, this assumes that nothing changes in current arrest/detention/processing practices.**

Commissioner Christina B. Helms asked about staff that would be required. She asked about the current number of officers and the number that would be needed in the future.

Alan Richardson suggested that question could be answered later in the presentation.

Commissioner Sides asked if the inmates who would be in the infirmary for medical needs are taken into account in the total number of beds needed and in the average daily population.

Dr. Jablonski responded that is built into the numbers and that component of the population would be in a future step.

Vice Chair Brian W. Helms addressed Commissioner Christina B. Helms' question regarding the number of officers that would be needed. He said that

when this item was discussed previously, there had been some modeling in regard to the number of officers that would be required for certain size facilities but not one as large as what is now being discussed.

Brian Matthews, County Manager, interjected that once the Board gives direction on a total buildout, there are some additional components they will be studying and part of those will be staffing needs. Mr. Matthews said the consultant will provide better defined cost estimates, and options for phasing the project, all of which will be as a second phase.

Commissioner Christina Helms stated that the Sheriff's Office has a hiring challenge currently, and recruiting applicants is going to be a challenge to house this many individuals. She said it is a concern that needs to be considered.

Vice Chair Brian W. Helms reminded that utility costs will be a huge factor, because it would be more than doubling the size of the current facility.

Dr. Jablonski shared that based upon past experiences and their visits with stakeholders in Union County, they anticipate an immediate doubling of bookings when a new facility opens. He added that much of it is population growth but said they are also seeing a more serious crime issue in terms of what offenses are being conducted now versus 25 years ago.

He displayed the following slide:

Post-Facility Opening - Booking Increase

Year	With Current Policies and Practices Continuing			With An Expanded Jail Facility Allowing For More Bookings At Projected ALOS		
	Daily Bookings	Total ADP	Total Bed Need	Daily Bookings	Total ADP	Total Bed Need
Current	14.9	255	319	30	657	822
2030	17.7	349	435	32.9	721	901
2035	20.5	425	531	36.1	791	988
2040	23.4	503	628	39.2	858	1073
2045	26.2	580	725	42.4	929	1161
2050	30	657	822	45.5	996	1246

Dr. Jablonski said the right side of the table is in his opinion a very realistic portrayal of what could happen in terms of reality.

Commissioner Sides asked Dr. Jablonski if part of the study includes their firm making recommendations on potential changes that can be made that would affect the average daily population.

Dr. Jablonski answered in the affirmative and stated the one handicap with Union County is it did not have the criminal court case data. He said Union

County is much more efficient and progressive in terms of trying to manage its jail population and in making efforts to defer and deflect individuals from custody in comparison with another jurisdiction in Georgia for which his firm completed a study.

Commissioner Sides asked if it was assumed that all of the bookings end up in the jail and are not being released on bond in the numbers for an expanded jail facility which would allow more bookings.

Dr. Jablonski said the majority of individuals booked into jail are released on bond. He noted that the longer cases are very serious criminal matters.

Commissioner Sides asked if Dr. Jablonski were saying if the bottle neck of limited jail capacity were removed, the bookings would almost double overnight.

Dr. Jablonski responded, "yes, sir."

Commissioner Christina Helms asked Dr. Jablonski if he saw any changes in his projections with the new President's administration's stance.

Dr. Jablonski said he thought so and explained that when the projections were built, his assumptions did not take into account what might happen with immigration enforcements. He stated that his assumptions and modeling do not take that into account. He added that he thought it was helpful on their part if, in the future, that becomes less murky, and bookings increase over what they have projected, they can provide the number of beds needed.

Commissioner Sides asked if it would take one year to design a jail and then four years to construct.

Mr. Richardson estimated that it would take approximately four years to construct.

Mr. Matthews stated that there are other law enforcement agencies in the county that the County does not control that decide who to arrest.

Dr. Jablonski commented that Union County is growing, but it got behind the eight ball in terms of the size of the facility, and needed a larger facility some time ago, and the demand exist for the product.

Commissioner Christina Helms asked Dr. Jablonski if he had data showing the age grouping of the detainees that he could share with the Board, which he stated he did have this information.

Mr. Richardson shared the slide below showing the next steps for the Jail Study:

Next Steps for Jail Study

1. Determine total number of beds for full build out
2. Program development
 - Operational scenario development
 - Building component narratives
 - Space allocation tables
3. Preliminary staffing estimates
3. Comparative operational cost model
 - Full capacity
 - Phased capacity



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Mr. Richardson said the buildout could occur in phases. He stated the backbone (core infrastructure) could be built out for the full buildout but possibly approach it in phases and find ways to manage some issues and slow the growth so not as many beds may be needed or at least not as quickly.

He stated that once the number of beds is determined, the next step would be program development. Mr. Richardson explained that this is how the Sheriff's team wants to operate the facility to be as efficient as possible. He said they wanted to determine the operations first and then develop a design that will support those operations.

Mr. Richardson stated that the preliminary staffing estimates will depend on the size of the facility, number of housing units, the capacity of the housing units, and the operational philosophy. He said they would develop some very high level staffing estimates. Mr. Richardson stated that at every step along the way staffing needs to be revisited and refined. He further said what will be spent to construct a facility will pale in comparison to what will be spent to operate it. He shared that the rule of thumb is over the course of 30 years, the initial construction costs would be approximately ten percent of the costs over time. He stated the other 85 to 90 percent would be operational costs, 80 percent of that amount would be staffing. He stressed the importance of doing it right and efficiently. He said that efficient does not always mean less staff. He stated it means the right number of staff to safely operate this facility. He said they would develop some comparative operational cost models for full capacity and for phased capacity. He reiterated that at this stage those would be very high level numbers. He stated that would be the next phase for their firm for the study.

Chair Merrell stated that before tonight there was a lot of conversation about wanting space to bring in federal inmates. She asked if the numbers were based on the County's growth or the County's growth to bring in federal

inmates.

Mr. Richardson responded that the numbers did not include federal inmates. He explained that they want to let the County know what its responsibility is for housing inmates in the County. He added that should the County choose to contract with the U.S. Marshall's Office or another federal agency, that would be a policy decision that the Board would have to make that will include numbers and a quantity.

Mr. Richardson responded to a question asked earlier in the meeting regarding the persons included on the stakeholders' list. He said they spoke with the Sheriff, the Chief Deputy, many of the jail staff, the Finance Director, food service, health services, lieutenant over investigations, an Assistant County Manager, a District Court Judge, the District Attorney's Office, Human Services Administrator, Environmental Health, Superior Court Judge, Court Security, representatives from Waxhaw, Monroe, and Wingate Police Departments, Deputy County Manager, one of the Magistrates, the Chief Public Defender, and the Clerk of Court.

Vice Chair Brian W. Helms stated there is much more the Board of Commissioners has to consider besides the judicial staff and law enforcement.

He added he had posed several questions tonight about arrests and bookings. He said that, obviously, the study that was done was based off a number of assumptions. The Vice Chair stated that if people are not being arrested or being detained, because there is not bed space, that is, in his opinion, a threat to the safety of the residents. He said the bigger question is "why are we not arresting and detaining people?" He further asked "Is it because there is not bed space or that we do not want to send people to Cabarrus County?"

Mr. Richardson said that he could answer that question from the responses they received repeatedly is because "There is no room at the inn."

Vice Chair Brian W. Helms interjected that inmates are also being sent to Cabarrus County. He questioned the daily cost of inmates being sent to Cabarrus County.

There was a comment that the cost was approximately \$70 per day.

Patrick Niland, Deputy County Manager, interjected that Cabarrus County has to have the staff available in Cabarrus County to handle Union County's overflow of inmates. He added that sometimes Cabarrus County does not have available staff. Mr. Niland said that Union County has worked with Cabarrus County to determine if Union County can send staff to Cabarrus County or if Cabarrus County can over hire staff, but it is a concern that it might not have available staff to watch the inmates from Union County.

Vice Chair Brian Helms asked about costs and said he did not see in the study a comparison in the State of North Carolina in the study. He said his personal feeling is "Does Union County need a new facility?" The Vice Chair stated he thought one could look at the existing facility and make the case that structurally, yes, a new facility is needed. He asked "Are additional beds needed?" He answered "probably." He stated that he has a difficult time

believing that 822 beds are needed.

Chris Boyd shared that the Board has its retreat planned for February 12. He said they planned to present some scenarios showing bed count and core size. Mr. Boyd stated they would present several scenarios and will attach high level cost to them. He said it is important to move to the next phase of the study to at least get to a decision on a bed count and core size, so the consultant can start programming work. Mr. Boyd stated they thought it would take approximately 60 to 90 days once the Board gives direction on bed count and core size to finish the study, which would be some time in June or July to be able to bring a complete report to the Board.

Commissioner Sides asked if any conclusions could be drawn from other counties with which Union County usually identifies that are close in size that have somewhat the same growth pattern. He said Cabarrus County has a 600 bed jail, but it is not quite as heavily populated as Union County, but it is growing, and they have room for some of Union County's inmates. He questioned how soon Cabarrus County will be capped out.

Mr. Boyd said that the Sheriff's Office did some comparisons to other surrounding counties and like sized counties. He stated that Commissioner Sides was not on the Board at that time, but staff could provide that information again.

Commissioner Sides asked that the information be provided to the Board prior to the retreat to allow them time to review it.

Commissioner Christina Helms said that in October the Council on Aging came before the Board and asked for additional funds for Meals on Wheels. She stated that the Council on Aging produced numbers for the Board that showed the population up to 2042. She said according to the numbers that the Council on Aging produced, it projected approximately 380,000 people in 2042, and according to the projections on this presentation, the County's population would be 225,000.

Mr. Matthews responded that the County's population is already at 260,000. He said he thought this information may be using the adult population.

Commissioner Christina Helms suggested that the Board should reflect on these numbers and obtain more information, because these numbers do not seem to be accurate. She said it is making her very concerned, and taxpayers are going to be on the hook for a multitude of things that organizations are asking that the County provide. Commissioner Christina Helms said that she wanted to make sure going forward that the numbers being presented to the Board are the correct numbers.

Mr. Matthews recommended using the numbers from the County's Comprehensive Plan.

Dr. Jablonski said that according to the State Demographer's Officer, the total population for Union County for 2032 would be 314,562 and the adult population would be 193,868.

Mr. Matthews stated that he thought Commissioner Christina Helms was

referring to 2042.

Dr. Jablonski said the total population for 2042 showed to be 379,556 and the adult population would be 224,800.

At approximately 8:19 p.m., Chair Merrell called for a recess in the regular meeting.

Chair Merrell reconvened the regular meeting at approximately 8:34 p.m.

25-044 2055 Metropolitan Transportation Plan Candidate Projects

Chair Merrell recognized Bjorn Hansen, Planning Department, Senior Planner – Long Range Planning, to present this item.

Mr. Hansen stated that this presentation is on candidate projects that can be submitted for consideration by the Charlotte Regional Transportation Planning Organization (CRTPO) Long-Range Plan. He explained that this is part of a three-step process. Mr. Hansen said the projects have been envisioned, and now they are being prioritized, and the ones that are prioritized will move to implementation.

He displayed a map of the Comprehensive Plan for Union County in the CRTPO portions which are the urbanized portions or areas projected to urbanize.

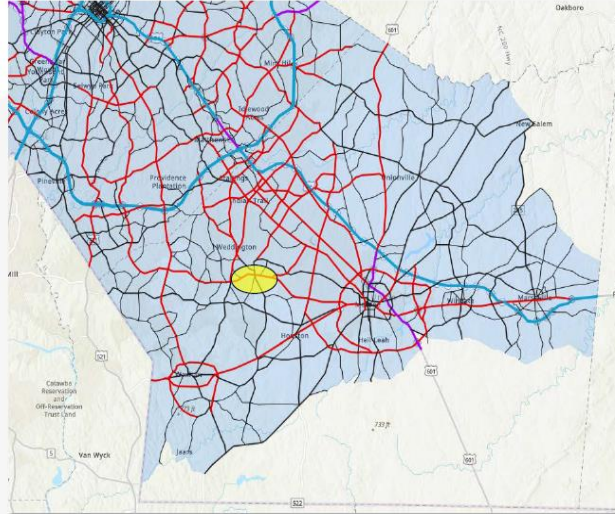
He explained that the last time the County went through this process was approximately five years ago, and the Metropolitan Transportation Plan (MTP) was adopted four years ago. Mr. Hansen listed the projects that are funded: Providence Road widening; Rea Road Extension; Monroe Road; U.S. Highway 74; a series of intersection projects; and Highway 601 up to the Monroe Expressway. He said these projects are all in some stage of implementation. He stated they are in the process of updating the new list of projects going out to 2055.

Mr. Hansen explained that CRTPO is soliciting projects through February 14, and it will evaluate the projects and a variety of perspectives such as safety, cost benefit, impacts on the community and then provide a draft list in May and complete the work hopefully by July.

He pointed out that the money is already committed now through 2035. Mr. Hansen stated that the list of projects includes background information and includes coordination with the affected municipalities. He described the projects:

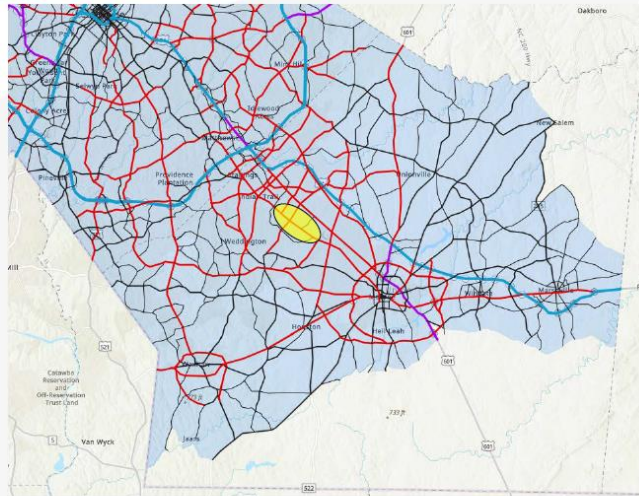
NC 84 from Wesley Chapel to Airport Road

- Impacted Municipality: Wesley Chapel
- Distance: 2.5 miles
- Consistent with Union County 2050 Comprehensive Plan
- NC route status increases competitiveness
- Cross-section: four lanes with median and bicycle/ pedestrian facilities
- Purpose and Need: NC 84 currently carries approximately 15,000 vehicles per day, with increasing traffic volumes projected due to continued development along the corridor. In addition, a lack of bicycle and pedestrian facilities or turn lanes reduces safety for users. The proposed widening will increase safety and reduce congestion along a key east-west corridor within Union County.



Old Charlotte Highway from Wesley Chapel Stouts to Rogers

- Impacted Municipalities: Indian Trail and Monroe
- Distance: 1.5 miles
- Consistent with Union County 2050 Comprehensive Plan
- Cross-section: four lanes with median and bicycle/ pedestrian facilities
- Purpose and Need: Old Charlotte Highway currently carries approximately 20,000 vehicles per day, with increasing traffic volumes projected due to continued development along the corridor. In addition, a lack of bicycle and pedestrian facilities or turn lanes reduces safety for users. The proposed widening will increase safety and reduce congestion along a central corridor within Union County.

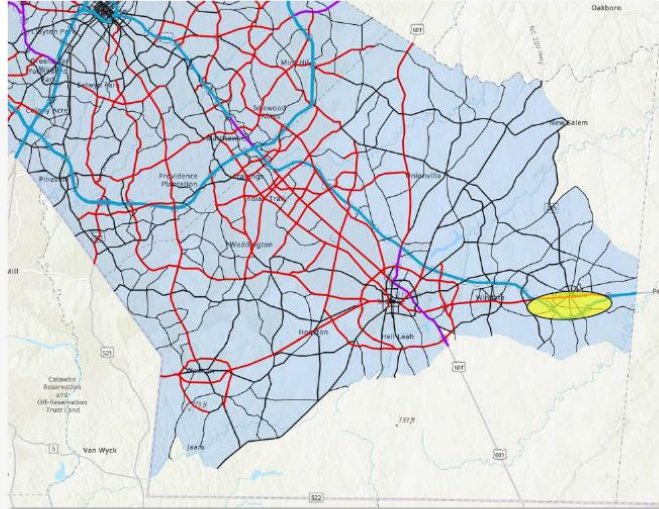


Vice Chair Brian W. Helms asked Mr. Hansen if Indian Trail and Monroe are in support of this project.

Mr. Hansen responded in the affirmative that Indian Trail and Monroe are in support of the project.

Marshville Bypass

- Impacted Municipalities: Marshville
- Distance: 5 miles
- Consistent with Union County 2050 Comprehensive Plan
- Tolling study underway, but assumption is 25% of cost would be paid through tolls
- Cross-section: Four-lane controlled-access
- Purpose and Need: US 74 currently carries over 2,000 trucks per day, with increasing traffic volumes due to the Monroe Expressway. The proposed bypass will shift truck traffic out of central Marshville and create a more livable main street for the Town. Furthermore, this bypass helps implement a vision for a controlled-access facility between Charlotte and the Port of Wilmington, supporting economic activity.



Commissioner Sides asked if the Turnpike Authority agrees to make it a toll, would that expedite the construction.

Mr. Hansen stated that it would expedite the construction.

Commissioner Sides asked if the County should petition the Turnpike Authority to make it a toll road.

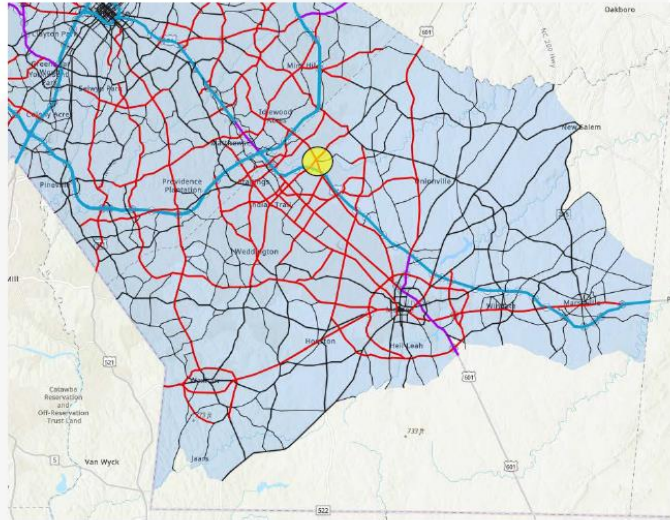
Mr. Hansen responded that by submitting the project and if it makes it into the Metropolitan Transportation Plan, that it allows it to be in the queue for funding into design and implementation.

Commissioner Sides questioned when the Turnpike Authority becomes involved as far as making it a toll road.

Mr. Hansen responded that would be as part of the design and implementation.

Idlewild, Mill Grove, and Indian Trail-Fairview Intersections

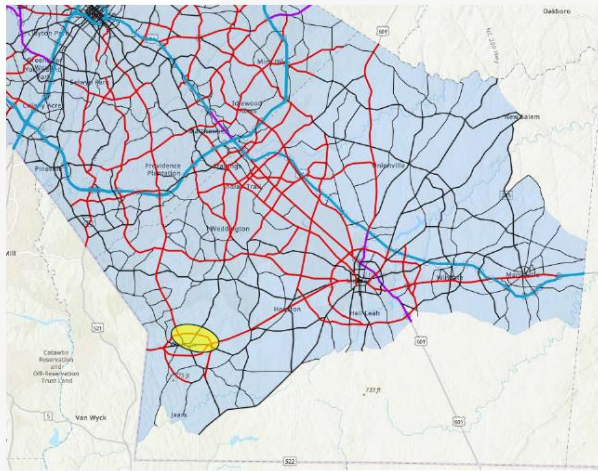
- Impacted Municipalities: Indian Trail and Hemby Bridge
- Distance: 1/8 mile
- Consistent with 2023 Critical Intersection Analysis
- High traffic and crash totals increases competitiveness
- Design: TBD
- Purpose and Need: Intersection improvements at the intersections of Idlewild and Mill Grove, and Idlewild and Indian Trail-Fairview are needed to improve flooding resiliency, mobility and safety of the existing intersections. Idlewild Road carries between 15,000 and 20,000 vehicles per day through these two intersections. The side streets carried approximately 15,000 vehicles per day. The two intersections have had over 60 crashes in the past five years, and the combined project is found in the 2023 Critical Intersection Analysis.



Mr. Hansen explained that the following project is not a request for support but is a recommendation to oppose:

Waxhaw Parkway

- Impacted Municipalities: Waxhaw and Mineral Springs
- Distance: 2 miles
- Mineral Springs and Union County oppose project
- Congestion and safety issues on existing NC 16 and NC 75 increase competitiveness
- Design: two lanes on four lane alignment



Mr. Hansen noted that Waxhaw has some alternatives for what it is submitting. He stated there is a segment that goes from N.C. Highway 16 to Waxhaw and Indian Trail, which is completely within the town, so Union County has no comments on it. He said the overall segment going to N.C. Highway 75 crosses through Mineral Springs and crosses through unincorporated Union County, and the County has taken a position in the past, which this would be consistent with that position, to oppose that project. He shared that the Town of Mineral Springs is scheduled to take similar action at its meeting next Thursday night.

Commissioner Sides asked if the widening of Highway 16 was planned in the earlier years.

Mr. Hansen responded that it is funded and the design is underway. He described it as a very near term project.

Vice Chair Brian W. Helms stated for clarity that in regards to the Waxhaw Parkway, Union County and Mineral Springs are opposed to it. He said that as far as the CRTPO at this point, no local points have been assigned to the project, and there has been some reluctance to take this issue up because the three stakeholders (Union County, Mineral Springs, and Waxhaw) do not have any common agreement.

Mr. Hansen stated that the request tonight is to support the proposed applications for NC Highway 84, Idlewild Road, Old Charlotte Highway, and the Marshville Bypass and to oppose the Waxhaw Parkway proposed application.

Vice Chair Brian W. Helms moved to adopt the action requested: to support the proposed applications for the following candidate projects as presented for 2055 Metropolitan Transportation Plan submittal with the exception of the Waxhaw Parkway. He stated his motion would include continuing to oppose the Waxhaw Parkway.

- NC 84 from Wesley Chapel to Airport Road
- Old Charlotte Highway from Wesley Chapel Stouts to Rogers Road
- Marshville Bypass
- Idlewild Road, Mill Grove Road, and Indian Trail-Fairview Intersections.

The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

25-047 Union County Land Preservation and Easement Program Update

Chair Merrell recognized Alan Aldridge, Soil and Water Conservation, District Director, to present this item.

Mr. Aldridge stated that farmland loss in Union County ranks second in the United States for open space and land loss annually. He further stated that Union County ranks 13th in the United States for open space land loss on an annual basis. He reviewed previous actions by the Board on November 6, 2023, approving staff to apply for a North Carolina Farmland Preservation Trust Fund grant; approving the Union County Soil and Water Conservation District to purchase and hold conservation easements for land preservation in Union County; and adopting Budget Amendment #14 appropriating the County's General Fund unassigned fund balance in the amount of \$969,006 to be used for the purchase of conservation easements and associated transaction costs.

He reviewed the staff's actions since the approval of the program:

Staff Action Since Program Approval

- **December 2023-** Applied for a Program Development Grant through the NC Agricultural Development and Farmland Preservation Trust Fund program
- **April 2024-** Application Interview with NC ADFP staff
- **May 2024-** Applied for a Facilitation Grant through the Working Lands Trust and the Foundation of Soil and Water
- **June 2024-** Awarded a Facilitation Grant through the Working Lands Trust and the Foundation of Soil and Water
- **July 2024-** Provided the template from WLT for Union County's Land Preservation and Easement Program
- **August 2024-** Awarded \$15,000 from NC ADFP for the Program Development Grant

Staff Action Continued

- Developed a proposed Land Preservation and Easement Program Ordinance with Union County Legal Department
- Worked with the Soil and Water Board of Supervisor and the Agriculture Advisory Board to set priorities and develop a ranking criteria for future easements
- Currently working with the Rural Land Committee to set future priority areas for ranking criteria
- Engaged landowners interested in potential conservation easements

Mr. Aldridge explained the pilot project:

Easement 90-2025-001

- 104 acre farm off Hwy 200 (Morgan Mill Road)
- 48 acres in crop production and 51 acres of forestland
- 36.5 acres have soils of statewide importance with 26.4 acres being prime farmland
- 3,100 feet of river frontage, historic mill site on the property, it is a Century Farm, and it is in the Voluntary Agricultural District.

County	2025 Estimated FMV of Land	Present-Use Value of Land	Total Conservation Easement Value	75% Conservation Easement Payout Perpetual Easement	25% Donation Value
Union	\$ 1,015,000.00	\$ 52,900.00	\$ 962,100.00	\$ 721,575.00	\$ 240,525.00

Easement cost does not include transactional cost (Survey, BDR, Environmental assessment, legal)

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Mr. Aldridge reviewed the second easement:

Easement 90-2025-002

- 59 acre farm off Walters Mill Road
- 35 acres in crop production and 20 acres of forestland
- 25 acres have soils of statewide importance
- 3 acres of ponds on the property
- 100% Donation

County	Estimated FMV of Land	NCDOR Median Sales Ratio Value as of January 1, 2024	Adjusted Appraised Value of Land	Present-Use Value of Land	Total Donated Conservation Easement Value
Union	\$ 405,800.00	66.97%	\$ 605,942.96	\$ 54,100.00	\$ 551,842.96

Easement cost does not include transactional cost (Survey, BDR, Environmental assessment, legal)

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He stated that all the County has to pay for on this easement will be transactional costs, surveys, environmental assessments, and legal fees associated with the easement.

Mr. Aldridge explained other opportunities that would be available as the program moves forward, which included asking for matching opportunities through the Agricultural Development and Farmland Preservation Program (ADFP) through the North Carolina Department of Agriculture and the Agricultural Land Easements (ALE) through the Natural Resource Conservation Service. He said they are also working with easement partners such as the Catawba Lands Trust, Working Lands Trust, and 3 Rivers Land Trust.

Mr. Aldridge reviewed the requested actions of the Board:

BOCC Action's Requested

- Adopt the Union County land preservation & easement ordinance as attached.
- Approve the allocation of funds from BUDGET 10115410-5630-11115 for the purchase of Easement 90-2025-001 for the amount of \$721,575.00.
- Accept Easement 90-2025-001 into the Union County Land Preservation & Easement Program.
- Accept the donation of Easement 90-2025-002 into the Union County Land Preservation & Easement Program.
- Adopt Budget Amendment 22 appropriating the County's General Fund unassigned fund balance in the amount of \$885,991.90 to be used for the purchase of conservation easements and associated transaction costs.

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Mr. Aldridge stressed that the amount of the Budget Amendment #22 of \$885,991.90 is Present Use rollback monies for 2024 for land coming of ag, forestry, horticulture, and wildlife.

Commissioner Christina Helms asked the amount of federal funds received by Union County to increase the dollar amount to add land into the preservations.

Mr. Aldridge responded "zero."

Commissioner Christina Helms asked if the County could get funds from the federal government for this program.

Mr. Aldridge explained that one of the main reasons to have the Union County program was speed. He said if the County were to apply for an ADFP easement, it would take three to five years to get 50 percent and once that is received, the County would have to apply for ALE. He said it would be a three to seven year process. He said when landowners are thinking about easements, they had a health scare or something has happened, and they are thinking about the future of their land. He stated the County will apply for federal funds which is a part of the program.

Commissioner Christina Helms asked what happens to the property after the landowner passes.

Mr. Aldridge stated that it would transfer to the next landowner and remains in the program for perpetuity.

Commissioner Christina Helms asked who is responsible for the taxes once the property is entered into the program.

Mr. Aldridge stated it would be the landowner.

Commissioner Christina Helms asked if this would be a revocable or irrevocable trust.

Mr. Aldridge stated he could not answer that question.

Jason Kay, County Attorney, responded that it generally falls into the realm of irrevocable documentation. He clarified that it is not technically trust but is more of an easement that is purchased.

Patrick Niland, Deputy County Manager, interjected that on the last bullet point of the action requested, if the Board wants to approve it, the funding would come from the County's available fund balance.

Commissioner Christina Helms asked for the number of other properties that have indicated an interest in the easement program.

Mr. Aldridge responded that they have not pushed out the program, but he anticipates there being interest from those watching the meeting.

Commissioner Sides asked in light of the program increasing in popularity, should this be considered as a regular budget item for next year rather than coming out of fund balance.

Mr. Niland explained that as land comes out of the ag program, three years of taxes are clawed back and that is the funding being used to pay for the program. He said the Board could allocate additional funding to the program if it chose to do so.

Brian Matthews, County Manager, stated that from year to year the number changes on the amount of taxes from land coming out of the ag program.

Chair Merrell asked Mr. Matthews for his comments regarding the monies coming out of the fund balance.

Mr. Matthews said certainly it has an impact on the overall budget, but from staff's perspective, it looks at the benefit from the program. He stated the Board has made it very clear that it has a desire to protect rural open space and the rural character of the community. He said this is a way to do so. He added that it does have an impact, but he thought it was a good program.

Commissioner Christina Helms moved to approve the actions listed for Item 25-047 as follows:

- Adopt the Union County land preservation & easement ordinance;
- Approve the allocation of funds from BUDGET 10115410-5630-11115 for the purchase of Easement 90-2025-001 for the amount of \$721,575.00.
- Accept Easement 90-2025-001 into the Union County Land Preservation & Easement Program.
- Accept the donation of Easement 90-2025-002 into the Union County Land Preservation & Easement Program.
- Adopt Budget Amendment 22 appropriating the County's General Fund unassigned fund balance in the amount of \$885,991.90 to be used for the

purchase of conservation easements and associated transaction costs.

Vice Chair Brian W. Helms said when the Board previously discussed this matter, he was a big proponent of the program and is still a proponent of the program. He said he thought the comments by the County Manager were spot on, and this is a piece of the fabric for Union County. He stressed the importance of agriculture to the County and maintaining these easements to make sure these properties remain agriculture based is immensely important especially considering the residential growth.

Commissioner Sides said he seconded the Vice Chair's comments. He stated they do not make good land anymore, and once it is turned into a shopping center or residential, it does not go back to farmland. He said the numbers that Mr. Aldridge had provided by the loss of farmland and how Union County ranks in the nation are a very sobering figure.

Commissioner Christina Helms said it was not a number of which to be proud. She expressed appreciation to Mr. Aldridge for providing this information to the Board. She shared that this is something very near and dear to her heart along with many others in the audience that are farmers or have been farmers. She said being 13th in the nation is not something of which to be proud. She stated that she was very honored that she was able to present this tonight.

Following the discussion, the motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

ORDINANCE BOOK 5

0339

ORDINANCE ADDING ARTICLE III TO CHAPTER 4 OF THE UNION COUNTY CODE

WHEREAS, the Union County Board of County Commissioners (the "Board") hereto enacted certain ordinances related to the promotion of agricultural values and the general welfare of the County, which have been successful in protecting agricultural land in Union County; and

WHEREAS, the Board desires to add a new Article, which will establish a program for preserving the County's agricultural farmland in a manner that directs and accommodates responsible growth and development; and

WHEREAS, the Union County Farmland Preservation and Easement Program Ordinance assists with encouraging the preservation of qualifying farmland, and to foster the growth, development, and sustainability of farmland in Union County; and

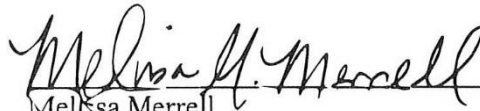
WHEREAS, the Board has determined that it is in the best interests of the residents of Union County to add Article III as hereinafter set forth.

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

I. The Union County Code is hereby amended by adding a new Article III to Chapter 4 of the Union County Code, as shown on Exhibit A attached to this ordinance.

2. This Ordinance is effective February 3, 2025.

Adopted this 3rd day of February 2025.


Melissa Merrell
Chair, Union County Board of Commissioners

BUDGET AMENDMENT

BUDGET	<u>General Fund</u>	REQUESTED BY	<u>Alan Aldridge</u>
FISCAL YEAR	<u>FY 2025</u>	DATE	<u>February 03, 2025</u>

INCREASE

Description

Fund Balance Appropriation	<u>885,991</u>
Payments to Other Governmental Units	<u>885,991</u>

DECREASE

Description

Explanation: Appropriate fund balance for Union County Soil & Water Conservation District to purchase & hold conservation easements for land preservation in Union County.

DATE _____

APPROVED BY _____

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

FOR POSTING PURPOSES ONLY

DEBIT

<u>Code</u>	<u>Account</u>	<u>Amount</u>
<u>10115410-5630-11115</u>	<u>Payments to Other Gov Units</u>	<u>885,991</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total 885,991

Prepared By JP
Posted By _____
Date _____

CREDIT

<u>Code</u>	<u>Account</u>	
<u>10115410-4991-11115</u>	<u>Fund Balance Appropriated</u>	<u>885,991</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total 885,991

Number 22

25-54 Appointments to Boards and Committees

a. Consolidated Human Services Board

Chair Merrell shared that there are nine vacancies on the Consolidated Human Services Board.

Vice Chair Brian W. Helms moved to appoint Noyes Harrigan to fill the vacant “Engineer” position and to reappoint Lisa Kerner to fill the “Other Person” position on the Consolidated Human Services Board.

The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

b. Board of Equalization and Review

Vice Chair Brian W. Helms moved to reappoint Thomas J. Smith to serve on the Board of Equalization and Review.

The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

b. Library Board of Trustees

Vice Chair Brian W. Helms moved to reappoint Valerie H. Gromlovits (Waxhaw Representative), Julie Thomas (At-Large Representative), and Charlene B. Baucom (Marshville Representative) on the Union County Library Board of Trustees. V

The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

County Manager's Comments

Brian Matthews, County Manager, expressed appreciation for the opportunity to work for the Board.

Commissioners' Comments

There were no closing comments by Commissioner Sides or Commissioner Christina Helms.

Vice Chair Brian W. Helms expressed appreciation to the individuals who spoke tonight. He said he appreciated the engagement from the public and the participation. He said he thought the speaker from Trees Union was fantastic, and he certainly appreciated her comments. He stated he also appreciated the comments from others who had concerns about animal welfare. The Vice Chair also shared his appreciation for staff stating that tonight has been a long night, but he said he thought there had been a lot of good discussion, and it has been a good productive meeting.

Commissioner Baucom said he was happy to see the farm at Morgan Mill Road and Rocky River going into the Land Preservation and Easement Program. He shared that he has often admired this farm and often would have liked to have bought that farm, but this is the next best thing that it will remain in agriculture.

Chair Merrell said she would be remiss if she did not acknowledge former Commissioner Jerry Simpson and expressed appreciation to him for attending tonight's meeting. She said it is always great to see him active.

She stated that Jimmy Bention, Chairman of Union County Board of Education, was also in attendance tonight.

She also acknowledged Joel Downs for his participation.

Adjournment

With there being no further comments or discussion, at approximately 9:08 p.m., Chair Merrell moved to adjourn the regular meeting. The motion passed by a unanimous vote as follows:

Chair Merrell	Aye
Vice Chair Brian W. Helms	Aye
Commissioner Baucom	Aye
Commissioner Christina B. Helms	Aye
Commissioner Sides	Aye

Exhibit "A"

October - December 2024

Department	Vendor	Purpose	Dollar Amount	Date
General Services - Fleet Management	TWIN TRANSMISSION	REPAIRS TO ASSET 34-17	\$5,852.50	10/1/2024
Board of Election	ANOTHER PRINTER INC	6,000 Ballot envelopes - 6"x11.375" 6,000 Ballot return envelopes - 6.5"x11.875" 6,000 Ballot outgoing envelopes - 9"x12"	\$7,737.85	10/1/2024
Sheriff's Office	Smarsh, Inc.	Renewal #1 for Archive Services for Union County Sheriff's Office.	\$30,377.25	10/3/2024
Parks and Recreation	Union County Public Schools	To conduct a 5K Fun Run at Jesse Helms Park	\$100.00	10/7/2024
Public Works - Water & Wastewater	McCarter Electrical Company	To provide electrical services on an as needed basis for the Union County Water department.	\$40,000.00	10/7/2024
General Services - Fleet Management	GRIFFIN MOTOR CO INC	ESTIMATED ENGINE REPAIRS TO ASSET 05-19 SEE ATTACHED ESTIMATE	\$11,705.26	10/7/2024
Sheriff's Office	CDW LLC	CONTRACT #OMNIA MESA 20204056-01 - GOV (2024056-01). PER QUOTE #PCTN620, DATED 10/01/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$13,991.04	10/7/2024
Public Communications	FRIEDMANS PREMIER SYTEMS INC	UC Store inventory items, county funds, 10123101-5370. No shipping as vendor holds items and reimburses for dept purchases. Contract #8956	\$5,397.82	10/9/2024
General Services - Fleet Management	BEACHUM AND LEE FORD INC	ESTIMATED REPAIRS FOR 90-19 SEE ESTIMATE	\$8,648.40	10/9/2024
Sheriff's Office	FEDERAL CONTRACTS LLC	SOURCEWELL CONTRACT #020923-GNR. PER QUOTE #QUO006482, DATED 10/02/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$10,665.50	10/9/2024
Sheriff's Office	THE ARTCRAFT GROUP INC	PER QUOTE #31006, DATED 10/03/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$11,523.00	10/9/2024
General Services - Facilities Management	MSS SOLUTIONS LLC	install new Hanwha cameras and connect them to the existing Exacqvision server at the Emergency Services Building in Monroe, NC	\$22,666.00	10/9/2024
General Services - Facilities Management	HOSS HINSON	Furnish and Install (12) 4'x4' Armstrong Lyra Direct attach clouds, relocate sprinkler heads, patch and paint ceiling.	\$26,380.00	10/9/2024
Public Works - Water & Wastewater	PETE DUTY AND ASSOCIATES INC	2-SULZER ABS MODE SUB SUB GRINDER PUMP	\$28,735.00	10/9/2024
General Services - Facilities Management	CAROLINA FURNISHING AND DESIGN	UNION CO PUB IIBRARY/ FURNITURE/ MARSHVILLE BRANCH OM SEATING (OFFICE MASTER) AND SPECIA T ARE BOTH ON NC STATE CONTRACT # 5610A PRICING INCLUDES DELIVERY AND INSTALLATION Item	\$32,846.00	10/11/2024
911 Communications	CAROLINA RECORDING SYSTEMS LLC	Annual Maintenance for NexLog740DX Recording System for 911 at primary and backup center	\$40,540.00	10/11/2024
Public Communications	Friedman's Premier Systems Inc. d/b/a iPromo	Amendment for one-year renewal of contract #7285 per agreement for UC Store, online employee store for purchasing branded apparel and promotional items. This is under the Fixed Price Agreement Policy-see notes at bottom.	\$3,000.00	10/14/2024
General Services - Fleet Management	Daikin Applied Americas, Inc.	Renew contract #6742 for an additional one (1) year term and add the chillers at Southwest Regional Library and Sheriff's Office Administration Building.	\$20,804.00	10/14/2024

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Budget	HealthQuest of Union County	Community Partner Grant funding for the purpose of operating a free pharmacy which provides pharmaceuticals and pharmaceutical care to individuals in the service area of Atrium Health Union who are unable to obtain these services due to their financial status and who meet the criteria set by HealthQuests board of directors.	\$22,784.00	10/14/2024
Public Works - Engineering	Telecommunications & Industrial Consulting Services Corp (TELICS)	FY22 Short Water Line Extension Phase C – Easement Acquisition Services	\$24,195.00	10/14/2024
Public Works - Engineering	Telecommunications & Industrial Consulting Services Corp (TELICS)	FY22 Short Water Line Extension Phase A – Easement Acquisition Services	\$36,820.00	10/14/2024
Public Works - Engineering	Telecommunications & Industrial Consulting Services Corp (TELICS)	FY22 Short Water Line Extension Phase B – Easement Acquisition Services	\$39,605.00	10/14/2024
Sheriff's Office	Cemco Systems, Inc.	3 Year Service Agreement for Maintenance for Uninterruptible Power Systems (UPS)	\$7,045.50	10/15/2024
Sheriff's Office	LexisNexis Risk Solutions, Inc.	Subscription for LexisNexis +AI for State/Local Government. Year #1- \$4,392.00 Year #2- \$4,608.00 Year #3- \$4,836.00	\$13,836.00	10/15/2024
Public Works - Engineering	Worldwide Industries Corporation	IFB 2022-026 Marshville Tank Rehab - Construction contract settlement agreement.	\$41,877.67	10/15/2024
General Services - Facilities Management	Kleinfelder, Inc.	Task Order 02 - Special Inspection and Construction Materials Testing for SWRL Parking Lot Extension and Additional Sidewalk	\$6,210.00	10/16/2024
Budget	Common Heart, Inc.	Community Partner Grant funding for the purpose of eradicating food insecurity and eliminating generational poverty	\$10,000.00	10/16/2024
Budget	New Covenant Community Development Center	Community Partner Grant Funding for the purpose of providing a range of educational and experiential learning opportunities for economically and socially at-risk youth.	\$25,000.00	10/16/2024
Budget	Union County Community Shelter	Community Partner Grant funding for the purpose of assisting homeless persons.	\$30,000.00	10/16/2024
General Services - Fleet Management	THE BOYD GROUP US INC	ESTIMATED REPAIRS TO ASSET 18-20 DEDUCTIBLE	\$5,000.00	10/16/2024
Information Systems	ZOHO CORPORATION	24x7 Network Monitoring	\$5,130.00	10/16/2024
Sheriff's Office	GENERAL MEDICAL DEVICES INC	PER QUOTE #106125, DATED 10/02/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$8,200.00	10/16/2024
County Manager's Office	Common Heart Inc.	CDBG Public Service Grant for HUD program year 2024 for Pantry Network	\$16,652.15	10/18/2024
County Manager's Office	Union County Community Shelter	CDBG Public Service Grant for HUD program year 2024 for Union County Community Shelter	\$25,000.00	10/18/2024
County Manager's Office	Common Heart, Inc.	CDBG Public Service Grant for HUD program year 2024 for Common Heart, Inc.	\$37,740.00	10/18/2024
General Services - Facilities Management	CONNECTIVITY LLC	Data Drops for Cameras	\$1,899.90	10/18/2024
Human Services - Social Services	Vanguard Professional Staffing	Social Worker to make visits in Arizona to a foster child	\$5,580.00	10/21/2024

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General Services - Facilities Management	Johnson Controls Fire Protection	Renew contract #7834 for one additional year for Fire Safety System Inspection Services and add one domestic backflow at the South West Regional Library for an additional \$560 per year.	\$11,720.00	10/21/2024
Sheriff's Office	IRON HORSE MOTORCYCLES	PER QUOTE DATED 10/18/24, ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$16,549.00	10/21/2024
		Replace aging assets at Lib and Water Depts		
Information Systems	LENOVO (UNITED STATES) INC	ThinkPad L16 G1, Intel® Core™ Ultra 5 125U	\$19,400.00	10/21/2024
General Services - Facilities Management	Gensler Architecture, Design & Planning, P.C. D/B/A Gensler	Task Order Amendment 02 - Union County Government Center First Floor Finishes and Lobby Renovation	\$3,365.00	10/22/2024
Public Works - Planning & Resource Mgmt	N. Harris Computer Corporation (NorthStar Utilities Solutions)	Purchase, implement, and maintain 17 additional user licenses	\$17,240.00	10/22/2024
County Manager's Office	Turning Point, Inc.	CDBG Public Service Grant for HUD program year 2024 for Turning Point, Inc..	\$42,600.00	10/23/2024
Public Works - Water & Wastewater	CONSOLIDATED PIPE & SUPPLY COMPANY INC	12 X 17 D1200 METER BOX BODY	\$5,130.00	10/23/2024
Board of Elections	BOB BROOKS COMPUTER SALES INC	TONERS FOR BALLOT ON DEMAND PRINTERS OKI B412/B432 7K TONER CARTRIDGE OEM	\$8,806.00	10/23/2024
Public Works - Water & Wastewater	ILLINOIS TOOL WORKS	QUOTE# CS220722 16HP HTMA CLASS 11 SKID \$9995 50' HYDRAULIC HOSE REEL KIT \$2899 REVERSIBLE VALVE OPERATOR \$8995 VALVE KEY \$ 595 SHIPPING & HANDLING \$665	\$23,149.00	10/23/2024
Public Works - Water & Wastewater	ELITE MECHANICAL HVAC LLC	PROPOSAL #11407 REPLACE MINI SPLIT IN SERVER RM	\$6,800.00	10/24/2024
Public Works - Water & Wastewater	JET-VAC EQUIPMENT COMPANY LLC	QUOTE # 5403 PUMP PACKAGE PLUS LABOR, FREIGHT, SUPPLIES & SC TAXES	\$6,923.45	10/24/2024
Public Works - Water & Wastewater	CLEAN MANAGEMENT ENVIRONMENTAL GROUP INC	QUOTE 89372 12 - 275 GAL TOTES DISPOSAL @ \$1950 EA PLUS \$550 FOR TRANSPORTATION, MANIFESTS, LABELS	\$23,950.00	10/24/2024
General Services - Facilities Management	GARMON MECHANICAL SERVICE INC	Replace two water heaters at the Judicial Center	\$29,200.00	10/24/2024
General Services - Facilities Management	LaBella Associates, P.C.	Task Order for Engineering Services for improvements to the dual 72-inch corrugated metal pipes (CMP) culvert at Cane Creek Park.	\$39,790.00	10/25/2024
Public Works - Planning & Resource Mgmt	Aquatic Informatics Inc.	Amendment to execute and exercise the option to renew the Agreement for a second Renewal Term. This term will be from September 23, 2024 to September 22, 2025.	\$44,881.20	10/25/2024
General Services - Fleet Management	TWIN TRANSMISSION	TRANSMISSION REBUILD ON 43-19 SEE ATTACHED ESTIMATE	\$5,852.50	10/25/2024
Public Works - Business Operations	TECH DATA CORPORATION	ANNUAL MAINTENANCE QUOTE #5254514	\$29,243.96	10/25/2024
Human Services - Social Services	Northwoods Consulting Partners, Inc.	Add 4 new license to current agreement	\$5,309.00	10/28/2024

Public Communications	Business Impact Group, LLC	RFP 2024-088 Branded Items and Fulfillment - development of online employee store for branded apparel and promotional items. This agreement meets the definition of a Fixed Price Term Agreement under the BOCC-adopted Fixed Price Term Agreements Policy.	\$10,150.00	10/28/2024
General Services - Facilities Management	TranSystems Corporation	The County desires to develop a parking plan for the property at 610 Patton Avenue in Monroe, North Carolina. This facility prepares new fleet and EMS vehicles for service, repairs fleet vehicles, and stores surplus vehicles. The 5.01 acre parcel currently has several metal or brick buildings that facilitate the repair and preparation of fleet vehicles on the front half of the property facing Patton Ave., while the remainder of the parcel is unpaved.	\$24,300.00	10/29/2024
COOPERATIVE EXT SERVICE ADMIN	SYDELL INC	Livestock items for 4H Livestock groups	\$8,511.60	10/29/2024
Emergency Management	DLX ENTERPRISES	SMRPA12T - MRP ASAP TAN SHELTER 12x16ft	\$15,598.95	10/29/2024
Public Works - Water & Wastewater	NIX PURSER & ASSOCIATES INC	EAST SIDE SEWER LIFT STATIONS 1,2 & 3 - DIAGNOSIS SCADA ISSUES, RE-ASSEMBLE RTU AND PLACE BACK IN SERVICE THE EXISTING DFS/NPA PUMP CONTROL & TCU SCADA SYSTEM RTU PANELS. QUOTE DATED 10.9.24 DWIGHT PURSER	\$16,617.64	10/29/2024
Emergency Management	DLX ENTERPRISES	SMRPA18T - MRP ASAP-18 TAN SHELTER 18x16ft	\$17,467.58	10/29/2024
County Manager's Office	Union County Crisis Assistance Ministry, Inc.	CDBG Public Service Grant for HUD program year 2024 for Union County Crisis Assistance Ministry, Inc.	\$21,000.00	10/30/2024
General Services - Facilities Management	Gensler Architecture, Design & Planning, P.C.	Task Order Amendment - Progress Building Parking Lot Improvements	\$2,760.00	10/31/2024
General Services - Facilities Management	TK ELEVATOR CORPORATION	REPAIR TO EMPLOYEE ELEVATOR AT THE JUDICIAL CENTER PER QUOTE DATED 10/25/24 REFERENCE ID# ACIA-29HU8DO	\$20,860.00	10/31/2024
Board of Elections	HART INTERCIVIC INC	8.5 X 17 BALLOT STOCK WITH WATERMARK AND CORNER CUT	\$6,176.64	11/1/2024
Fire Services	QUALITY EQUIPMENT & SUPPLY CO INC	EB-1590 Extendedobed with one custom carrier design	\$7,373.00	11/1/2024
LIBRARY	FARONICS TECHNOLOGIES USA INC	DEEP FREEZE CLOUD SUBSCRIPTION SPLIT PAYMENT - YEAR TWO OF THREE	\$9,997.00	11/1/2024
Human Services - Social Services	Hope and Home	visitation for foster child	\$5,000.00	11/4/2024
Human Services - Public Health	BENCO DENTAL	CAVITRON JET PLUS	\$12,441.18	11/5/2024
Sheriff's Office	ANSI NATIONAL ACCREDITATION BOARD LLC	PER INVOICE #INV-014919, DATED 11/03/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$6,900.00	11/7/2024
Sheriff's Office	LAWMEN'S DISTRIBUTION LLC	PER QUOTE #SQ-409514, DATED 11/6/24. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$8,564.95	11/7/2024
General Services - Solid Waste	D A GRIFFIN CONSTRUCTION LLC	Enclose 22x70 portion of new building at Austin Chaney Site. Price includes labor and all materials. Description on quote.	\$28,500.00	11/7/2024

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County Manager's Office	Duke Energy Carolinas, LLC	This item was presented and approved by the BoCC on the (item 24-729) October 21, 2024 meeting. The Forest Hills High School construction project is currently underway and will require the installation of a new transformer to provide adequate utility coverage for the site. Duke Energy Carolinas, LLC requires the conveyance of an easement according to the attached documents. Union County staff and legal have agreed to the terms of the conveyance.	\$1.00	11/8/2024
County Manager's Office	Courtyard Greenville Downtown	Please expedite this agreement as it is imperative that this item is submitted to Courtyard Greenville Downtown by tomorrow, 11/8/2024, due to the upcoming holiday on 11/11/2024. The hotel stay is intended for the managers visiting the Greenville County EMS Headquarters and the City of Greenville Public Safety and Municipal Complex. Additionally, they will be holding their mid-year retreat in Greenville, SC which will be held in the same hotel.	\$1,652.00	11/8/2024
General Services - Facilities Management	Khalid Davis, D/B/A Khalid Davis Electric	Due to excessive heat gain in the generator room after an exhaust fan was installed, additional modifications are needed, this change order will cover the Install of a new discharge box to control the heat flow inside the generator room.	\$10,556.73	11/12/2024
Parks and Recreation	Alliance for Children	To allow Parks and Recreation to participate in the 2024 Union County Christmas Parade.	\$50.00	11/13/2024
Public Works - Engineering	WK Dickson & Co., Inc.	Task Order 2017-15 Amendment 3: services outside the scope of the Task Order are needed, including additional construction administration and observation beyond the original contract substantial and final completion milestones due to defective work by the Contractor. Additional services outlined herein include additional coatings inspection services.	\$20,042.88	11/13/2024
Sheriff's Office	DANA SAFETY SUPPLY	PER QUOTE #553227, DATED 11/05/24, ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$4,628.76	11/13/2024
General Services - Fleet Management	THE BOYD GROUP US INC	REPAIRS TO ASSET 30-20 DEDUCTIBLE	\$5,000.00	11/13/2024
General Services - Fleet Management	BAUCOM SERVICE INC	REPAIRS TO ASSET 36-02	\$5,976.74	11/13/2024
Social Services Administration	WALMART	GIFT CARDS FOR FOSTER CHILDREN CHRISTMAS PROJECT - 150 CARDS AT \$50 EACH	\$7,500.00	11/13/2024
General Services - Fleet Management	TWIN TRANSMISSION	TRANSMISSION REPLACEMENT FOR 01-18	\$8,129.17	11/13/2024
Sheriff's Office	LAWMEN'S DISTRIBUTION LLC	NC STATE CONTRACT #680C, PER QUOTE #SQ-409617, DATED 11/08/24. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$10,109.45	11/13/2024
Sheriff's Office	ANSI NATIONAL ACCREDITATION BOARD LLC	PER QUOTE #2024-11-3, DATED 11/08/24. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$13,000.00	11/13/2024

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Public Works - Water & Wastewater	SOUTHERN IONICS INCORPORATED	TRAILER RENTAL \$2500 DELIVERY & PICKUP OF TRAILER \$2247.50 LSA 38 \$13,065.00	\$17,812.50	11/13/2024
Office of Legal Counsel	V. V. and G. V.	Settlement Agreement for easement for V V and G V, Parcel No. 07-066-771. This parcel is part of the Crooked Creek Interceptor, Ph II project.	\$8,598.05	11/14/2024
Public Works - Water & Wastewater	PREMIER SIGNS AND GRAPHICS LLC	JOB #9938 24X24 REFLECTIVE SIGNS - 68 QTY	\$6,052.00	11/14/2024
General Services - Facilities Management	PLYLER ASPHALT, LLC	Pave approximately 1,200 sq. ft.	\$7,200.00	11/14/2024
Information Systems	MIS TOPCO L P	Global Protect with integrated soln for firewalls	\$10,000.00	11/14/2024
Sheriff's Office	THE ARTCRAFT GROUP INC	PER QUOTE #31880, DATED 11/01/2024, ATTACHED AND INCORPORATED HEREIN BY REFERENCE.	\$14,072.00	11/14/2024
Human Resources	MSS SOLUTIONS LLC	CAMERA @ BOARD OF Board of Elections BUILDING PROPOSAL # 2424724	\$7,300.00	11/18/2024
General Services - Facilities Management	COX DOOR COMPANY INC	Take down existing door and install new one at the Radio Shop.	\$12,397.00	11/18/2024
General Services - Facilities Management	LOCKWOOD IDENTITY INC	Main Library Monument sign replacement.	\$20,510.00	11/18/2024
Sheriff's Office	K2 SOLUTIONS INC	PER QUOTE #141016, DATED 11/06/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$3,228.84	11/19/2024
Sheriff's Office	ACCESSIBILITY PROFESSIONALS INC	PER QUOTE #QUO-25386-C9S2R6, DATED 10/14/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$7,955.00	11/19/2024
General Services - Facilities Management	CM BOWERS LLC	Electrical Construction / Upfit for Union County Government Center Light Fixtures This estimate includes removing existing light fixtures and installing new light Fixtures	\$8,450.00	11/19/2024
General Services - Facilities Management	Accruent, LLC	Renew contract #6136 for FAMIS work order system.	\$29,791.55	11/20/2024
Human Services - Community Support and Outreach	Nutrition Plus of Greenville, Inc. d/b/a Nutrition Plus	Provides dietetic consultation and clinical nutrition assessments for WIC client, increasing NTE amount	\$47,250.00	11/20/2024
Public Works - Engineering	CDM Smith Inc.	Task Order 8686-01 - Flow modeling and capacity analysis for Forest Park Pump Station.	\$49,850.00	11/20/2024
Human Services - Community Support and Outreach	Volgistics Inc.	Senior Nutrition volunteer management	\$900.00	11/21/2024
County Attorney's Office	D. P. and M. E. P.	Settlement Agreement for easement for D. P. and M. E. P., Parcel 08-123-015B. This parcel is part of the FY21 Short Water, Ph. C Project.	\$6,725.00	11/21/2024
County Attorney's Office	G. E. B. and J. L.B.	Settlement Agreement for easements for G. E. B. and J. L. B., Parcel 08-054-008. This parcel is part of the 762 Zone 24" Transmission Main Project	\$17,000.00	11/21/2024

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COOPERATIVE EXT SERVICE ADMIN	NORTH CAROLINA STATE UNIVERSITY	NC 4H Congress	\$2,550.00	11/21/2024
Public Works - Water & Wastewater	CURTIS POWER SOLUTIONS LLC	QUOTE #CS-1172024-JOFMR2 LOCATION 8299 KENSINGTON DR WAXHAW FUEL TANK MAINTENANCE	\$11,320.00	11/21/2024
General Services - Facilities Management	COX DOOR COMPANY INC	Take down and haul off existing doors and install the above new rollup doors.	\$22,250.00	11/21/2024
TRANSPORTATION	BLOSSMAN SERVICES INC	BLOSSMAN GAS ALL LOCAL FUNDS	\$29,999.00	11/21/2024
Cooperative Extension	TOP HILL, INC	Catering for Farm City Banquet	\$10,837.31	11/22/2024
Sheriff's Office	MAGNET FORENSICS LLC	PER QUOTE #Q-344427-1, DATED 11/11/24. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$12,410.00	11/22/2024
ENVIRONMENTAL Health	APPLEONE INC	Temporary Staffing	\$22,170.72	11/22/2024
County Manager's Office	Classroom Central	CDBG Public Service Grant for HUD program year 2024 for Classroom Central	\$13,000.00	11/25/2024
General Services - Solid Waste	Civil & Environmental Consultants, Inc.	FY25 Environmental Monitoring.	\$44,000.00	11/25/2024
Emergency Management	ELEVATED TRAINING AND CONSULTING LLC	FEMA All-Hazards Division Supervisor - Division Supervisor 3 day course. 2/11/25 - 2/13/25	\$33,948.00	11/25/2024
Information Systems	MIS TOPCO L P	Managed Services for Palo Alto Firewalls	\$46,800.00	11/25/2024
General Services - Facilities Management	Diamond H Land Works LLC.	Turn Key lump sum for Septic Repairs at 2901 Brooks Road, Wingate NC 7200 Nesbit Road, Waxhaw NC 2913 Waxhaw Indian Trail Road, Waxhaw NC	\$44,000.00	11/27/2024
Sheriff's Office	LAWMEN'S DISTRIBUTION LLC	NC STATE CONTRACT 680C, PER QUOTE #4316528000114726297. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$3,879.95	11/27/2024
Public Works - Water & Wastewater	H & H FARM MACHINE CO INC	QUOTE #01-3201 DEN-VERT 6250 GALLON	\$7,813.62	11/27/2024
Sheriff's Office	INTREPID NETWORKS LLC	PER QUOTE #2110-1012 DATED 11/19/24. ATTACHED AND INCORPORATED HEREIN BY REFERENCE.	\$7,956.00	11/27/2024
Sheriff's Office	AARDVARK	PER QUOTE #SO18223, DATED 05/16/24, ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$12,755.00	11/27/2024
SOIL CONSERVATION	WMF LAND SERVICE, LLC	Stream Debris Removal	\$19,500.00	11/27/2024
Parks and Recreation	Union County Public Schools	To conduct a Polar Plunge fundraiser at Cane Creek Park.	\$100.00	12/3/2024
Library	World Book, Inc.	Online Advanced Reference Package	\$10,773.00	12/3/2024
Human Services - Public Health	PRIORITY HEALTHCARE DISTRIBUTION, INC	NEXPLANON 68MG IMPLANT	\$16,380.30	12/3/2024
Sheriff's Office	GENASYS INC	PER QUOTE #SQ-006597-1, DATED 11/26/24. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$18,389.86	12/3/2024
County Manager's Office	USI Insurance Services, LLC	Legal to develop one year renewal amendment for USI (Insurance Broker) for Dec 2024 - Dec 2025	\$42,000.00	12/5/2024

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General Services - Facilities Management	HINSON ELECTRIC INC	Wiring up new Range and adding a dedicated circuit for a relocated drink machine	\$2,800.00	12/5/2024
General Services - Facilities Management	SHELLBACK POWER WASHING	Soft wash siding and trim to remove organic material to include all vinyl railings around property, lower enclosure, patios/porches, concrete driveway, and concrete mechanical area.	\$6,350.00	12/5/2024
General Services - Facilities Management	STEPHENS OFFICE SYSTEMS INC	Office furniture for Building Code	\$6,631.83	12/5/2024
COOPERATIVE EXT SERVICE ADMIN	CAROLINA GREENSCAPES OF MATTHEWS	Pathway for Teaching Garden	\$9,340.00	12/5/2024
General Services - Facilities Management	GARMON MECHANICAL SERVICE INC	Two backflow replacements at the Government Center	\$12,882.00	12/5/2024
General Services - Facilities Management	COUICKS CONCRETE FINISHING INC	Concrete work at the firing range to connect two buildings.	\$19,800.00	12/5/2024
Public Works - Water & Wastewater	MOTOROLA SOLUTIONS, INC	QUOTE #2917580 COMMUNICATION EQUIPMENT & SERVICES 7 EACH APX4500 ENHANCED MOBILE WITH ADD-ON'S	\$28,798.56	12/5/2024
Human Resources	Criteria Corp.	Web-based pre-employment aptitude testing platform	\$17,227.00	12/6/2024
Emergency Management	Emergency Service Solutions LLC	Contracted position funded by Duke Energy that supports Union County Emergency Management 's programs and practices related to radiological response, incident management, training, exercise, drills, and Emergency Operation Center functions.	\$24,000.00	12/9/2024
Public Works - Water & Wastewater	BW SERVICES LLC	QUOTE #101447 REPLACE 12" FLOW METER @ 12 MILE WWTP	\$5,834.65	12/10/2024
Human Services - Public Health	LENOVO (UNITED STATES) INC	NOTEBOOK THINKPAD L16 GEN1 21L4CTO1WWR	\$9,090.00	12/10/2024
Public Works - Water & Wastewater	FERGUSON US HOLDINGS INC	QUOTE #B001278 11 X 18 METER LID WITH AMR HOLE - 300 @ \$30.75E	\$9,225.00	12/10/2024
Public Works - Water & Wastewater	CURTIS POWER SOLUTIONS LLC	ESTIMATE #903001631 ABB & CPS ON SITE TO DIAGNOSE TROUBLESHOOT SWITCH GEAR FREQUENCY ISSUES	\$9,829.00	12/10/2024
Sheriff's Office	LAWMEN'S DISTRIBUTION LLC	PER QUOTE #SQ-41207, DATED 11/26/24, ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$10,724.53	12/10/2024
Public Works - Water & Wastewater	DATA FLOW SYSTEMS, INC	QUOTE #241206-01-MH 5 - TIM007-34 @ \$2,574 EACH	\$12,870.00	12/10/2024
Public Works - Business Operations	STAFFMARK INVESTMENT LLC	Temporary Staffing PO Dates: 12/9/24 – 3/31/25 Pay Rate: \$ 20.00 Bill Rate: \$ 26.12 PO Amount Requested: \$ 17,000	\$17,000.00	12/10/2024

Public Works - Water & Wastewater	CLEARWATER INC	QUOTE #20245361 3 EA POWERPACK SENSOR \$4756 EA 3 EA ACTIVE SITE MGMT \$418 EA 1 EA SUBSONIC MONITORING SYSTEM \$4744 1 EA ACTIVE SITE MGMT \$418 EA 3 EA SENSON REPLACEMENT FOR UP TO 4 TIMES PER YEAR \$1599 EA FREIG	\$25,634.00	12/10/2024
Public Works - Water & Wastewater	UNIFORCE CONSTRUCTION CORPORATION	REMOVAL & INSSTALLATION OF TWO 12" BLOW OFF PIPES LOCATED ON THE YADKIN TRANSMILLION LINE AT LAKE TWITTY	\$29,999.00	12/10/2024
COURT FACILITIES-CLERK OF COUR	SERVICE COMMANDER SOFTWARE INC	JURY SOFTWARE FOR ONE YEAR AND ELECTION BILL PROGRAMMING	\$7,745.00	12/11/2024
Public Works - Water & Wastewater	B&T INSULATION INC	INSULATE 8' X 16' TANK QUOTE 12.3.24 ANDREW TOTHEROW	\$10,500.00	12/11/2024
County Manager's Office	Lawrence Associates, PA	Task order for land surveying services associated with the Fairview Fire Department (parcel 08189030). Survey Services: Boundary •Boundary and physical survey of parcel 08189030 (+/- 1.38 Acres) •Location of existing visible utilities.	\$3,800.00	12/12/2024
County Manager's Office	Lawrence Associates, PA	Task order for land surveying services associated with the Austin Chaney Road parcels 09015013 & 09015013E. Boundary/Topographic/Utilities: • Boundary and physical survey of parcels 09015013 & 09015013E (+/- 18.9 Acres). • Topographic survey from previous aerial survey. • Location of existing visible utilities. • Location of roadway adjacent to subject property. • Contract with a private utility locator to mark utilities throughout the requested property. • Locate utilities marked by loca	\$19,500.00	12/12/2024
General Services - Facilities Management	J. P.	Additional Documents that where added by Legal. (Grant Agreement and Release) Turn Key lump sum for Septic Repairs at Waxhaw Indian Trail Road, Waxhaw NC This is related to the contract with Diamond H Land Works, LLC (contract 9293). This contract is the Grant Agreement and Release with the property owner.	\$44,000.00	12/12/2024
General Services - Facilities Management	D. C.	Additional Documents that where added by Legal. (Grant Agreement and Release) Turn Key lump sum for Septic Repairs at Nesbit Road, Waxhaw NC This is related to Diamond H Land Works, LLC contract (9293). This contract is the Grant Agreement and Release with the property owner.	\$44,000.00	12/12/2024

General Services - Facilities Management	K.R.	Additional Documents that where added by Legal. (Grant Agreement and Release) Turn Key lump sum for Septic Repairs at Brooks Road, Wingate NC This is related to the contract with Diamond H Land Works, LLC (contract 9293). This contract is the Grant Agreement and Release with the property owner.	\$44,000.00	12/12/2024
County Manager's Office	Medical Investigation Services, PLLC	The NC General Assembly has allocated funding to Union to be used to establish a county-operated regional autopsy center, The South Piedmont Regional Autopsy Center (SPRAC), to serve Anson, Cabarrus, Gaston, Montgomery, Moore, Richmond, Rowan, Stanly and Union County. This agreement is to contract with Medical Investigation Services, PLLC for the services of a qualified forensic pathologist and pathologists assistants to perform medical examiner autopsies.	\$45,000.00	12/16/2024
General Services - Facilities Management	STEPHENS OFFICE SYSTEMS INC	Table and chairs for Emergency Services.	\$3,850.90	12/16/2024
General Services - Solid Waste	GREEN RESOURCE LLC	Material to Hydroseed 2 acres	\$5,454.00	12/16/2024
General Services - Solid Waste	D A GRIFFIN CONSTRUCTION LLC	Form and pour 220 ft of concrete curb. Excavate and widen driveway 120 ft. Pour 6x70 ft valley swell. located at the Landfill near transfer station	\$23,500.00	12/16/2024
Sheriff's Office	DANA SAFETY SUPPLY	NC STATE CONTRACT #680D, PER QUOTE #554420, DATED 11/13/2024. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$29,385.24	12/16/2024
Public Works - Water & Wastewater	XYLEM DEWATERING SOLUTIONS, INC	QUOTE 118022856 GODWIN CD150M BY PASS PUMP	\$32,657.13	12/16/2024
General Services - Fleet Management	BAUCOM SERVICE INC	REPIARS TO ASSET 16-24 - DEDUCTIBLE SEE ESTIMATE	\$5,000.00	12/18/2024
Public Works - Water & Wastewater	NET TECH INTEGRATION LLC	QUOTE P24UCW04 SOPHOS INSTALL \$2080 SOPHOS LICENSES \$4065	\$6,145.00	12/18/2024
Public Works - Business Operations	CONSOLIDATED PIPE & SUPPLY COMPANY INC	QUOTE #S160338 8' MASTER METER \$6275 CARBON STEEL BOLT 2 - \$43	\$6,318.00	12/18/2024
Information Systems	VIGIL NETWORKS INC	UC Public Library Firewall	\$8,470.67	12/18/2024
General Services - Fleet Management	BEACHUM AND LEE FORD INC	20-21 ENGINE REPAIRS SEE QUOTE	\$8,499.12	12/18/2024
Public Works - Business Operations	SHI INTERNATIONAL CORP	ZENDESK 10 EACH	\$12,578.80	12/18/2024
Public Works - Water & Wastewater	NET TECH INTEGRATION LLC	QUOTE P24UCW03 INSTALL ACRONIS \$3,900 ACRONIS LICENSES \$16,965	\$20,865.00	12/18/2024
General Services - Facilities Management	GARMON MECHANICAL SERVICE INC	BOILER REPLACEMENT AT THE DETENTION CENTER	\$21,500.00	12/18/2024

COOPERATIVE EXT SERVICE ADMIN	HYATT FARMS SPORTING CLAYS LLC	Shackletime Event hosted by Richard Goforth Poultry Agent	\$2,653.89	12/23/2024
Information Systems	DAVENPORT GROUP	Comp Equip for Expansion of Security Guard Station	\$3,269.00	12/23/2024
Information Systems	THE I P GUYS NET LLC	Edge Firewall Maintenance Renewal	\$5,047.00	12/23/2024
Sheriff's Office	LAWMEN'S DISTRIBUTION LLC	PER QUOTE #SQ-410976, DATED 12/18/24. ATTACHED AND INCORPORATED HEREIN BY REFERENCE	\$8,145.40	12/23/2024
General Services - Facilities Management	R&J STARNES PAINTING CONTRACTORS	Painting at the Detention Center visitors and magistrate area.	\$14,681.00	12/23/2024
Public Works - Business Operations	CONSOLIDATED PIPE & SUPPLY COMPANY INC	QUOTE S162553 12X17 OVERLAPPING METER BOX LID W/ SENSUS HOLE 1500 EACH @ \$11.25	\$16,875.00	12/23/2024
Fire Marshal's Office	ESO Solutions, Inc	Maintenance contract for Emergency Reporting Software	\$36,028.80	12/28/2024
Public Communications	Flick Studios, LLC	Amendment #3 (of 3 per contract terms) to renew contract #6701 for on-call creative services for photography and videography.	\$10,000.00	12/30/2024
General Services - Facilities Management	UniFirst Corporation	Renew contract #8076 for an additional one (1)-year term.	\$12,400.00	12/30/2024
General Services - Fleet Management	TWIN TRANSMISSION	REPAIRS TO ASSET 14-18	\$5,994.10	12/30/2024
MEDICAL EXAMINER	FUNERAL SOURCE ONE SUPPLY & EQUIPMENT	Purchase of a powered scissor lift system HD 1000 max multi-directional top with scale for the medical examiners office.	\$6,682.00	12/30/2024
General Services - Fleet Management	GRIFFIN MOTOR CO INC	ENGINE REPAIRS TO ASSET 13-19	\$12,691.25	12/30/2024
General Services - Solid Waste	SETCO INC	JCB (Backhoe) 3CX 1300 x 24 12.50" AR/24SGL (2) Solid tires and freight	\$7,184.40	12/31/2024
General Services - Solid Waste	SETCO INC	18.5x59 SW 12" LE89C1C2 Solid Tires for CAT 938M and Freight	\$27,631.98	12/31/2024

Fixed Price Term Agreement Spend	
Friedman's Premiere Systems Inc. DBA iPromo	\$31,146.69
Unifirst Corporation	\$14,701.37



Pending Refund Report

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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
BROWN, MICHAEL PATRICK	BROWN, MICHAEL PATRICK		1805 PAINTED HORSE DR		INDIAN TRAIL, NC 28079	Proration	0026950265	CLH2062	AUTHORIZED	765987782	Refund Generated due to proration on Bill #0026950265-2024-2024-0000-00	Vehicle Sold	#####	12/31/2024	001	TAX	(\$16.13)	\$0.00	(\$16.13)
															600	TAX	(\$18.28)	\$0.00	(\$18.28)
															023	TAX	(\$5.06)	\$0.00	(\$5.06)
															003	TAX	(\$1.73)	\$0.00	(\$1.73)
															005	TAX	(\$0.38)	\$0.00	(\$0.38)
															004	TAX	(\$2.88)	\$0.00	(\$2.88)
															002	TAX	(\$36.99)	\$0.00	(\$36.99)
																	Refund	\$0.00	\$81.45
BUCHANAN, CHAD MATTHEW	BUCHANAN, CHAD MATTHEW		3008 SPRUELL CT		WAXHAM, NC 28173	Proration	0071309155	F0M3185	AUTHORIZED	875416240	Refund Generated due to proration on Bill #0071309155-2023-2023-0000-00	Vehicle Sold	#####	12/31/2024	001	TAX	(\$30.55)	\$0.00	(\$30.55)
															500	TAX	(\$72.07)	\$0.00	(\$72.07)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$7.85)	\$0.00	(\$7.85)
															003	TAX	(\$3.28)	\$0.00	(\$3.28)
															005	TAX	(\$0.73)	\$0.00	(\$0.73)
															004	TAX	(\$5.47)	\$0.00	(\$5.47)
																	Refund	\$0.00	\$190.00
BURITICA, GEORGE	BURITICA, GEORGE	BURITICA, TRICIA LILIOUKALANI	3032 KINGS MANOR DR		MATTHEWS, NC 28104	Proration	0073120079	HJ88028	AUTHORIZED	654866724	Refund Generated due to proration on Bill #0073120079-2023-2023-0000-00	Vehicle Sold	#####	12/18/2024	001	TAX	(\$49.19)	\$0.00	(\$49.19)
															800	TAX	(\$13.56)	\$0.00	(\$13.56)
															003	TAX	(\$5.27)	\$0.00	(\$5.27)
															005	TAX	(\$1.17)	\$0.00	(\$1.17)
															004	TAX	(\$8.80)	\$0.00	(\$8.80)
															002	TAX	(\$112.80)	\$0.00	(\$112.80)
BUSY BEAVER PLUMBING CO	BUSY BEAVER PLUMBING CO		6915 LIVE OATES LANE		WAXHAM, NC 28173	Adjustment < \$100	0080922352	VEL4888	PENDING	874887032	Refund Generated due to adjustment on Bill #0080922352-2024-2024-0000	Situa error	#####		001	TAX	\$0.00	\$0.00	\$0.00
															200	TAX	(\$37.59)	\$0.00	(\$37.59)
															200	VEHICLE FEE	(\$30.00)	\$0.00	(\$30.00)
															028	TAX	\$3.91	\$0.00	\$3.91
															003	TAX	\$0.00	\$0.00	\$0.00
															005	TAX	\$0.00	\$0.00	\$0.00
															004	TAX	\$0.00	\$0.00	\$0.00
																	Refund	\$0.00	\$0.00
BYRD, RONALD CURTIS	BYRD, RONALD CURTIS		803 GLADEDALE LN		MONROE, NC 28110	Proration	0007126104	H5780V	AUTHORIZED	654422712	Refund Generated due to proration on Bill #0007126104-2024-2024-0000-00	Vehicle Sold	#####	12/16/2024	001	TAX	(\$3.53)	\$0.00	(\$3.53)
															015	TAX	(\$1.19)	\$0.00	(\$1.19)
															003	TAX	(\$0.38)	\$0.00	(\$0.38)
															005	TAX	(\$0.08)	\$0.00	(\$0.08)
															004	TAX	(\$0.63)	\$0.00	(\$0.63)
															002	TAX	(\$8.08)	\$0.00	(\$8.08)
BYRD, RONALD CURTIS	BYRD, RONALD CURTIS		803 GLADEDALE LN		MONROE, NC 28110	Proration	0007126104	H5780V	AUTHORIZED	654422718	Refund Generated due to proration on Bill #0007126104-2023-2023-0000-00	Vehicle Sold	#####	12/16/2024	001	TAX	(\$0.30)	\$0.00	(\$0.30)
															015	TAX	(\$0.08)	\$0.00	(\$0.08)
															003	TAX	(\$0.03)	\$0.00	(\$0.03)
															005	TAX	(\$0.01)	\$0.00	(\$0.01)
															004	TAX	(\$0.05)	\$0.00	(\$0.05)
															002	TAX	(\$0.68)	\$0.00	(\$0.68)
CALDWELL, JOHNNY LEE	CALDWELL, JOHNNY LEE		10008 FARM POND RD		INDIAN TRAIL, NC 28079	Proration	0080554520	JLCLUVME	AUTHORIZED	763975562	Refund Generated due to proration on Bill #0080554520-2024-2024-0000-00	Vehicle Totalled	#####	12/17/2024	001	TAX	(\$13.52)	\$0.00	(\$13.52)
															600	TAX	(\$15.32)	\$0.00	(\$15.32)
															023	TAX	(\$4.24)	\$0.00	(\$4.24)
															003	TAX	(\$1.45)	\$0.00	(\$1.45)
															005	TAX	(\$0.32)	\$0.00	(\$0.32)
															004	TAX	(\$2.42)	\$0.00	(\$2.42)
															002	TAX	(\$31.00)	\$0.00	(\$31.00)
																	Refund	\$0.00	\$68.27
CHIOREAN, CLAUDIU	CHIOREAN, CLAUDIU		4318 HAMPS TEAD HEATH DR		WAXHAM, NC 28173	Proration	0047416878	THC4680	AUTHORIZED	872564496	Refund Generated due to proration on Bill #0047416878-2023-2023-0000-00	Vehicle Sold	#####	12/16/2024	001	TAX	(\$4.11)	\$0.00	(\$4.11)
															500	TAX	(\$9.70)	\$0.00	(\$9.70)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$1.06)	\$0.00	(\$1.06)
															003	TAX	(\$0.44)	\$0.00	(\$0.44)
															005	TAX	(\$0.10)	\$0.00	(\$0.10)
															004	TAX	(\$0.74)	\$0.00	(\$0.74)
																	Refund	\$0.00	\$9.43
CIAMPI, JOSEPH JAMES	CIAMPI, JOSEPH JAMES		500 WINTER WHEAT CT		WEDDINGTON, NC 28104	Proration	0079730320	BAN3409	AUTHORIZED	763976710	Refund Generated due to proration on Bill #0079730320-2023-2023-0000-00	Vehicle Sold	#####	12/17/2024	001	TAX	(\$5.31)	\$0.00	(\$5.31)
															000	TAX	(\$1.46)	\$0.00	(\$1.46)
															026	TAX	(\$1.22)	\$0.00	(\$1.22)
															003	TAX	(\$0.57)	\$0.00	(\$0.57)
															005	TAX	(\$0.13)	\$0.00	(\$0.13)
															004	TAX	(\$0.95)	\$0.00	(\$0.95)
															002	TAX	(\$12.17)	\$0.00	(\$12.17)
																	Refund	\$0.00	\$22.90

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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
DELORENZO, STEVEN	DELORENZO, STEVEN		8000 WICKLOW HALL DR		WEDDINGTON, NC 28104	Proration	0064683788	JLB7473	AUTHORIZED	652737600	Refund Generated due to proration on Bill #0064683788-2023-2023-0000-00	Vehicle Sold	12/3/2024	12/4/2024	001	TAX	(\$55.26)	\$0.00	(\$55.26)
															800	TAX	(\$15.24)	\$0.00	(\$15.24)
															003	TAX	(\$5.92)	\$0.00	(\$5.92)
															005	TAX	(\$1.32)	\$0.00	(\$1.32)
															004	TAX	(\$9.89)	\$0.00	(\$9.89)
															002	TAX	(\$126.70)	\$0.00	(\$126.70)
															Refund				
DOBRE, LUCIAN GABRIEL	DOBRE, LUCIAN GABRIEL		2809 DUNWOODY DR		INDIAN TRAIL, NC 28079	Proration	0051281181	606152	AUTHORIZED	763975548	Refund Generated due to proration on Bill #0051281181-2023-2023-0000-00	Vehicle Sold	12/17/2024	12/17/2024	001	TAX	(\$0.96)	\$0.00	(\$0.96)
															600	TAX	(\$1.09)	\$0.00	(\$1.09)
															023	TAX	(\$0.26)	\$0.00	(\$0.26)
															003	TAX	(\$0.10)	\$0.00	(\$0.10)
															005	TAX	(\$0.02)	\$0.00	(\$0.02)
															004	TAX	(\$0.17)	\$0.00	(\$0.17)
															002	TAX	(\$2.20)	\$0.00	(\$2.20)
Refund																	\$4.80		
DUIT, DEVON JACOB	DUIT, DEVON JACOB	DUIT, CHRISTINA LYNN	1220 BROUGH HALL DR		WAXHAW, NC 28173	Proration	0074793058	KKL3346	AUTHORIZED	873116264	Refund Generated due to proration on Bill #0074793058-2023-2023-0000-00	Vehicle Totalled	12/17/2024	12/17/2024	001	TAX	(\$9.52)	\$0.00	(\$9.52)
															500	TAX	(\$22.46)	\$0.00	(\$22.46)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$2.44)	\$0.00	(\$2.44)
															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																	\$59.20		
DUKE, WILLIAM RYLAND	DUKE, WILLIAM RYLAND		6215 PUMPERNICKEL LN		MONROE, NC 28110	Proration	0077972328	LBM1365	AUTHORIZED	764236424	Refund Generated due to proration on Bill #0077972328-2023-2023-0000-00	Vehicle Sold	12/19/2024	12/19/2024	001	TAX	(\$19.43)	\$0.00	(\$19.43)
															970	TAX	(\$1.54)	\$0.00	(\$1.54)
															026	TAX	(\$4.47)	\$0.00	(\$4.47)
															003	TAX	(\$2.08)	\$0.00	(\$2.08)
															005	TAX	(\$0.46)	\$0.00	(\$0.46)
															004	TAX	(\$3.48)	\$0.00	(\$3.48)
															002	TAX	(\$44.55)	\$0.00	(\$44.55)
Refund																	\$76.01		
ELMAN, JOANNE MCWILLIAMS	ELMAN, JOANNE MCWILLIAMS		1007 TRIPLE CROWN DR		INDIAN TRAIL, NC 28079	Proration	0016598791	BMD3464	AUTHORIZED	762097231	Refund Generated due to proration on Bill #0016598791-2023-2023-0000-00	Vehicle Sold	12/5/2024	12/6/2024	001	TAX	(\$5.95)	\$0.00	(\$5.95)
															600	TAX	(\$6.74)	\$0.00	(\$6.74)
															023	TAX	(\$1.61)	\$0.00	(\$1.61)
															003	TAX	(\$0.64)	\$0.00	(\$0.64)
															005	TAX	(\$0.14)	\$0.00	(\$0.14)
															004	TAX	(\$1.07)	\$0.00	(\$1.07)
															002	TAX	(\$13.64)	\$0.00	(\$13.64)
Refund																	\$29.79		
EROTOKRITOU, MARIOS	EROTOKRITOU, MARIOS	EROTOKRITOU, LORI ANN	2304 LORD ANSON DR		WAXHAW, NC 28173	Proration	0061479557	JHD1572	AUTHORIZED	652736892	Refund Generated due to proration on Bill #0061479557-2023-2023-0000-00	Vehicle Totalled	12/3/2024	12/4/2024	001	TAX	(\$5.68)	\$0.00	(\$5.68)
															026	TAX	(\$1.31)	\$0.00	(\$1.31)
															003	TAX	(\$0.61)	\$0.00	(\$0.61)
															005	TAX	(\$0.13)	\$0.00	(\$0.13)
															004	TAX	(\$1.01)	\$0.00	(\$1.01)
															002	TAX	(\$13.01)	\$0.00	(\$13.01)
															Refund				
FAULK SMITH, LILA DENISE	FAULK SMITH, LILA DENISE		1415 LAGGAN LN		INDIAN TRAIL, NC 28079	Proration	0071753398	TMO1175	AUTHORIZED	761853981	Refund Generated due to proration on Bill #0071753398-2023-2023-0000-00	Vehicle Sold	12/4/2024	12/5/2024	001	TAX	(\$10.60)	\$0.00	(\$10.60)
															600	TAX	(\$12.01)	\$0.00	(\$12.01)
															023	TAX	(\$2.86)	\$0.00	(\$2.86)
															003	TAX	(\$1.14)	\$0.00	(\$1.14)
															005	TAX	(\$0.25)	\$0.00	(\$0.25)
															004	TAX	(\$1.90)	\$0.00	(\$1.90)
															002	TAX	(\$24.29)	\$0.00	(\$24.29)
Refund																	\$53.05		
FERGUSON, HUBERT LOCKSLEY	FERGUSON, HUBERT LOCKSLEY		1305 RIDGE HAVEN RD		WAXHAW, NC 28173	Proration	0026995858	CLL1947	AUTHORIZED	872091696	Refund Generated due to proration on Bill #0026995858-2023-2023-0000-00	Vehicle Sold	12/12/2024	12/12/2024	001	TAX	(\$8.68)	\$0.00	(\$8.68)
															500	TAX	(\$20.48)	\$0.00	(\$20.48)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$2.23)	\$0.00	(\$2.23)
															003	TAX	(\$0.93)	\$0.00	(\$0.93)
															005	TAX	(\$0.21)	\$0.00	(\$0.21)
															004	TAX	(\$1.55)	\$0.00	(\$1.55)
002	TAX	(\$19.91)	\$0.00	(\$19.91)															
Refund																	\$53.99		
FISHER, DEANNA LOUISE	FISHER, DEANNA LOUISE	FISHER, PATRICK MICHAEL	706 SPRINGWOOD DR		WAXHAW, NC 28173	Proration	0077807769	EMD1606	AUTHORIZED	763291207	Refund Generated due to proration on Bill #0077807769-2023-2023-0000-00	Reg . Out of state	12/13/2024	12/13/2024	001	TAX	(\$67.89)	\$0.00	(\$67.89)
															970	TAX	(\$5.37)	\$0.00	(\$5.37)
															026	TAX	(\$15.60)	\$0.00	(\$15.60)
															003	TAX	(\$7.28)	\$0.00	(\$7.28)
															005	TAX	(\$1.62)	\$0.00	(\$1.62)
															004	TAX	(\$12.15)	\$0.00	(\$12.15)
Refund																	\$265.65		



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
HOLMES, JACKSON WINSLOW	HOLMES, JACKSON WINSLOW	HOLMES, STEVE HOMER	160 AMANDA DR		MATTHEWS, NC 28104	Proration	0074971998	KDN7237	AUTHORIZED	656560932	Refund Generated due to proration on Bill #0074971998-2023-2023-0000-00	Vehicle Sold	#####	12/31/2024	001	TAX	(\$16.55)	\$0.00	(\$16.55)
															000	TAX	(\$4.56)	\$0.00	(\$4.56)
															003	TAX	(\$1.78)	\$0.00	(\$1.78)
															005	TAX	(\$0.40)	\$0.00	(\$0.40)
															004	TAX	(\$2.96)	\$0.00	(\$2.96)
															002	TAX	(\$37.96)	\$0.00	(\$37.96)
															Refund				
HOOD, REGINA STINSON	HOOD, REGINA STINSON		6100 SUNRISE LN		MONROE, NC 28112	Proration	0072762038	JBR1705	AUTHORIZED	654068910	Refund Generated due to proration on Bill #0072762038-2023-2023-0000-00	Vehicle Sold	#####	12/12/2024	001	TAX	(\$15.52)	\$0.00	(\$15.52)
															015	TAX	(\$4.41)	\$0.00	(\$4.41)
															003	TAX	(\$1.66)	\$0.00	(\$1.66)
															005	TAX	(\$0.37)	\$0.00	(\$0.37)
															004	TAX	(\$2.77)	\$0.00	(\$2.77)
															002	TAX	(\$35.59)	\$0.00	(\$35.59)
															Refund				
HUNTER, KENNETH ALFRED JR	HUNTER, KENNETH ALFRED JR		2712 BENT OAK DR		MATTHEWS, NC 28104	Proration	0063581551	HDT4375	AUTHORIZED	762819729	Refund Generated due to proration on Bill #0063581551-2023-2023-0000-00	Vehicle Sold	12/9/2024	12/11/2024	001	TAX	(\$14.58)	\$0.00	(\$14.58)
															700	TAX	(\$16.62)	\$0.00	(\$16.62)
															023	TAX	(\$3.94)	\$0.00	(\$3.94)
															003	TAX	(\$1.56)	\$0.00	(\$1.56)
															005	TAX	(\$0.35)	\$0.00	(\$0.35)
															004	TAX	(\$2.61)	\$0.00	(\$2.61)
															002	TAX	(\$33.43)	\$0.00	(\$33.43)
Refund																	\$73.09		
IP, CHI WOO	IP, CHI WOO		2672 SOUTHERN TRACE DR		WAXHAW, NC 28173	Proration	0056499251	PMW2892	AUTHORIZED	872565192	Refund Generated due to proration on Bill #0056499251-2023-2023-0000-00	Vehicle Sold	#####	12/16/2024	001	TAX	(\$20.20)	\$0.00	(\$20.20)
															500	TAX	(\$47.67)	\$0.00	(\$47.67)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$5.19)	\$0.00	(\$5.19)
															003	TAX	(\$2.17)	\$0.00	(\$2.17)
															005	TAX	(\$0.48)	\$0.00	(\$0.48)
															004	TAX	(\$3.61)	\$0.00	(\$3.61)
002	TAX	(\$46.33)	\$0.00	(\$46.33)															
Refund																	\$125.65		
IP, CHI WOO	IP, CHI WOO		2672 SOUTHERN TRACE DR		WAXHAW, NC 28173	Proration	0051974334	HMS9696	AUTHORIZED	872565240	Refund Generated due to proration on Bill #0051974334-2023-2023-0000-00	Vehicle Sold	#####	12/16/2024	001	TAX	(\$4.67)	(\$0.36)	(\$5.03)
															500	TAX	(\$11.03)	(\$0.89)	(\$11.92)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$1.20)	(\$0.10)	(\$1.30)
															003	TAX	(\$0.50)	(\$0.04)	(\$0.54)
															005	TAX	(\$0.11)	(\$0.01)	(\$0.12)
															004	TAX	(\$0.84)	(\$0.07)	(\$0.91)
002	TAX	(\$10.72)	(\$0.86)	(\$11.58)															
Refund																	\$31.40		
JIMENEZ SOLIS, JOSE	JIMENEZ SOLIS, JOSE		118 KATHY ST		MONROE, NC 28110	Proration	0079533114	RJB6308	AUTHORIZED	761527284	Refund Generated due to proration on Bill #0079533114-2024-2024-0000-00	Vehicle Sold	12/3/2024	12/4/2024	001	TAX	(\$42.16)	\$0.00	(\$42.16)
															200	TAX	(\$129.00)	\$0.00	(\$129.00)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$4.52)	\$0.00	(\$4.52)
															005	TAX	(\$1.01)	\$0.00	(\$1.01)
															004	TAX	(\$7.54)	\$0.00	(\$7.54)
															002	TAX	(\$96.66)	\$0.00	(\$96.66)
Refund																	\$281.69		
JONES, JOHANNA CHRISTINE	JONES, JOHANNA CHRISTINE		9302 RICHARDSON KING RD		WAXHAW, NC 28173	Proration	0074476424	FAP0017	AUTHORIZED	655245738	Refund Generated due to proration on Bill #0074476424-2023-2023-0000-00	Vehicle Sold	#####	12/20/2024	001	TAX	(\$8.86)	\$0.00	(\$8.86)
															028	TAX	(\$2.27)	\$0.00	(\$2.27)
															003	TAX	(\$0.95)	\$0.00	(\$0.95)
															005	TAX	(\$0.21)	\$0.00	(\$0.21)
															004	TAX	(\$1.58)	\$0.00	(\$1.58)
															002	TAX	(\$20.32)	\$0.00	(\$20.32)
															Refund				
KEELING, BARBARA MAYHEW	KEELING, BARBARA MAYHEW	KEELING, DAVID EARL	2160 ASHLEY RIVER RD		WAXHAW, NC 28173	Proration	0034473312	HMH9826	AUTHORIZED	873415056	Refund Generated due to proration on Bill #0034473312-2023-2023-0000-00	Vehicle Sold	#####	12/19/2024	001	TAX	(\$1.85)	\$0.00	(\$1.85)
															500	TAX	(\$4.36)	\$0.00	(\$4.36)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$0.47)	\$0.00	(\$0.47)
															003	TAX	(\$0.20)	\$0.00	(\$0.20)
															005	TAX	(\$0.04)	\$0.00	(\$0.04)
															004	TAX	(\$0.33)	\$0.00	(\$0.33)
002	TAX	(\$4.24)	\$0.00	(\$4.24)															
Refund																	\$11.40		
KEELING, BARBARA MAYHEW	KEELING, BARBARA MAYHEW	KEELING, DAVID EARL	2160 ASHLEY RIVER RD		WAXHAW, NC 28173	Proration	0070259757	KEL4060	AUTHORIZED	873415064	Refund Generated due to proration on Bill #0070259757-2023-2023-0000-00	Vehicle Sold	#####	12/19/2024	001	TAX	(\$3.74)	\$0.00	(\$3.74)
															500	TAX	(\$8.81)	\$0.00	(\$8.81)
															500	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															028	TAX	(\$0.96)	\$0.00	(\$0.96)
															003	TAX	(\$0.40)	\$0.00	(\$0.40)
															005	TAX	(\$0.09)	\$0.00	(\$0.09)
															004	TAX	(\$0.67)	\$0.00	(\$0.67)
002	TAX	(\$8.57)	\$0.00	(\$8.57)															
Refund																	\$23.24		



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	
MONROE TRUCK REPAIR INC	MONROE TRUCK REPAIR INC		2290 SKYWAY DR		MONROE, NC 28110	Proration	0063037038	HM0938	AUTHORIZED	763081039	Refund Generated due to proration on Bill #0063037038-2023-2023-0000-00	Vehicle Sold	*****	12/12/2024	001	TAX	(\$3.74)	\$0.00	(\$3.74)	
															200	TAX	(\$11.51)	\$0.00	(\$11.51)	
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00	
															003	TAX	(\$0.40)	\$0.00	(\$0.40)	
															005	TAX	(\$0.09)	\$0.00	(\$0.09)	
															004	TAX	(\$0.67)	\$0.00	(\$0.67)	
															002	TAX	(\$8.57)	\$0.00	(\$8.57)	
															Refund			\$0.00	\$24.98	
MONTERO LAZO, WILLIAN JOSE	MONTERO LAZO, WILLIAN JOSE		1541 HAMMOND DR		MATTHEWS, NC 28104	Proration	0078606223	LBM3807	AUTHORIZED	764011213	Refund Generated due to proration on Bill #0078606223-2023-2023-0000-00	Vehicle Sold	*****	12/18/2024	001	TAX	(\$4.76)	\$0.00	(\$4.76)	
															700	TAX	(\$5.42)	\$0.00	(\$5.42)	
															020	TAX	(\$1.40)	\$0.00	(\$1.40)	
															003	TAX	(\$0.51)	\$0.00	(\$0.51)	
															005	TAX	(\$0.11)	\$0.00	(\$0.11)	
															004	TAX	(\$0.85)	\$0.00	(\$0.85)	
															002	TAX	(\$10.91)	\$0.00	(\$10.91)	
															Refund			\$0.00	\$23.96	
MOORE, STEVEN KEITH	MOORE, STEVEN KEITH		200 CARLS RD		MATTHEWS, NC 28104	Proration	0017922084	ADS8712	AUTHORIZED	764452766	Refund Generated due to proration on Bill #0017922084-2023-2023-0000-00	Vehicle Sold	*****	12/20/2024	001	TAX	(\$2.75)	\$0.00	(\$2.75)	
															700	TAX	(\$3.14)	\$0.00	(\$3.14)	
															020	TAX	(\$0.80)	\$0.00	(\$0.80)	
															003	TAX	(\$0.30)	\$0.00	(\$0.30)	
															005	TAX	(\$0.06)	\$0.00	(\$0.06)	
															004	TAX	(\$0.49)	\$0.00	(\$0.49)	
															002	TAX	(\$6.31)	\$0.00	(\$6.31)	
															Refund			\$0.00	\$13.85	
MOSCUZZA, CHRISTOPHER TRAVIS	MOSCUZZA, CHRISTOPHER TRAVIS	MOSCUZZA, KIMBERLY ANN	505 STATION DR		MONROE, NC 28110	Proration	0060026724	BCC4536	AUTHORIZED	764665790	Refund Generated due to proration on Bill #0060026724-2023-2023-0000-00	Vehicle Sold	*****	12/23/2024	001	TAX	(\$11.01)	\$0.00	(\$11.01)	
															900	TAX	(\$1.35)	\$0.00	(\$1.35)	
															021	TAX	(\$4.14)	\$0.00	(\$4.14)	
															003	TAX	(\$1.18)	\$0.00	(\$1.18)	
															005	TAX	(\$0.26)	\$0.00	(\$0.26)	
															004	TAX	(\$1.97)	\$0.00	(\$1.97)	
															002	TAX	(\$25.25)	\$0.00	(\$25.25)	
															Refund			\$0.00	\$45.16	
MTPLEASANT, DANIEL SCOTT	MTPLEASANT, DANIEL SCOTT	MONTANO, ELSA MERCEDES	1017 IRISH MOSS LN		MATTHEWS, NC 28104	Proration	0073920222	KBR2251	AUTHORIZED	655885350	Refund Generated due to proration on Bill #0073920222-2023-2023-0000-00	Vehicle Sold	*****	12/27/2024	001	TAX	(\$36.09)	\$0.00	(\$36.09)	
															020	TAX	(\$10.57)	\$0.00	(\$10.57)	
															003	TAX	(\$3.87)	\$0.00	(\$3.87)	
															005	TAX	(\$0.86)	\$0.00	(\$0.86)	
															004	TAX	(\$6.46)	\$0.00	(\$6.46)	
															002	TAX	(\$82.75)	\$0.00	(\$82.75)	
															Refund			\$0.00	\$140.60	
															MUNROE, ANDROLE MARIE	MUNROE, ANDROLE MARIE		2449 WAVERLY DR		MONROE, NC 28112
200	TAX	(\$25.83)	\$0.00	(\$25.83)																
200	VEHICLE FEE	\$0.00	\$0.00	\$0.00																
003	TAX	(\$0.90)	\$0.00	(\$0.90)																
005	TAX	(\$0.20)	\$0.00	(\$0.20)																
004	TAX	(\$1.50)	\$0.00	(\$1.50)																
002	TAX	(\$19.23)	\$0.00	(\$19.23)																
Refund			\$0.00	\$56.05																
MYERS, HENRY CHARLES	MYERS, HENRY CHARLES		3809 FARM WOOD DR		MONROE, NC 28110	Proration	0041208712	YL1605	AUTHORIZED	654069120	Refund Generated due to proration on Bill #0041208712-2023-2023-0000-00	Vehicle Sold	*****	12/12/2024	001	TAX	(\$22.82)	\$0.00	(\$22.82)	
															021	TAX	(\$8.58)	\$0.00	(\$8.58)	
															003	TAX	(\$2.45)	\$0.00	(\$2.45)	
															005	TAX	(\$0.54)	\$0.00	(\$0.54)	
															004	TAX	(\$4.08)	\$0.00	(\$4.08)	
															002	TAX	(\$52.31)	\$0.00	(\$52.31)	
															Refund			\$0.00	\$90.78	
MYERS, MARY HOUSE	MYERS, MARY HOUSE		3809 FARMWOOD DR		MONROE, NC 28110	Proration	0074332732	KKL2607	AUTHORIZED	654069114	Refund Generated due to proration on Bill #0074332732-2023-2023-0000-00	Vehicle Sold	*****	12/12/2024	001	TAX	(\$4.35)	\$0.00	(\$4.35)	
															021	TAX	(\$1.64)	\$0.00	(\$1.64)	
															003	TAX	(\$0.47)	\$0.00	(\$0.47)	
															005	TAX	(\$0.10)	\$0.00	(\$0.10)	
															004	TAX	(\$0.78)	\$0.00	(\$0.78)	
															002	TAX	(\$9.97)	\$0.00	(\$9.97)	
															Refund			\$0.00	\$17.31	
NAZZARO, SUSAN ELIZABETH	NAZZARO, SUSAN ELIZABETH	NAZZARO, FRANCIS CHARLES	8804 RED MAYNE CT		WAXHAM, NC 28173	Proration	0020976450	CAP9496	AUTHORIZED	654865950	Refund Generated due to proration on Bill #0020976450-2023-2023-0000-00	Vehicle Totalled	*****	12/18/2024	001	TAX	(\$10.09)	\$0.00	(\$10.09)	
															026	TAX	(\$2.32)	\$0.00	(\$2.32)	
															003	TAX	(\$1.08)	\$0.00	(\$1.08)	
															005	TAX	(\$0.24)	\$0.00	(\$0.24)	
															004	TAX	(\$1.81)	\$0.00	(\$1.81)	
															002	TAX	(\$23.15)	\$0.00	(\$23.15)	
															Refund			\$0.00	\$38.69	
NEAL, WILLIAM HUEY JR	NEAL, WILLIAM HUEY JR		3500 ELK WAY		INDIAN TRAIL, NC 28079	Proration	0062209216	DLP5247	AUTHORIZED	761854667	Refund Generated due to proration on Bill #0062209216-2024-2024-0000-00	Vehicle Sold	*****	12/4/2024	12/5/2024	001	TAX	(\$37.11)	\$0.00	(\$37.11)
															600	TAX	(\$42.07)	\$0.00	(\$42.07)	
															020	TAX	(\$12.17)	\$0.00	(\$12.17)	
															003	TAX	(\$3.98)	\$0.00	(\$3.98)	
															005	TAX	(\$0.89)	\$0.00	(\$0.89)	
															004	TAX	(\$6.64)	\$0.00	(\$6.64)	
															002	TAX	(\$85.09)	\$0.00	(\$85.09)	
Refund			\$0.00	\$187.95																

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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
TART, BRITTAIN REID	TART, BRITTAIN REID		9431 INDIAN TRAIL	FAIRVIEW RD	INDIAN TRAIL, NC 28079	Proration	0079367946	LCF6243	AUTHORIZED	761468855	Refund Generated due to proration on Bill #0079367946-2024-2024-0000-00	Vehicle Sold	12/2/2024	12/3/2024	001	TAX	(\$39.04)	\$0.00	(\$39.04)
															930	TAX	(\$4.78)	\$0.00	(\$4.78)
															016	TAX	(\$14.47)	\$0.00	(\$14.47)
															003	TAX	(\$4.19)	\$0.00	(\$4.19)
															005	TAX	(\$0.93)	\$0.00	(\$0.93)
															004	TAX	(\$6.98)	\$0.00	(\$6.98)
															002	TAX	(\$89.51)	\$0.00	(\$89.51)
			Refund		\$159.90														
TART, BRITTAIN REID	TART, BRITTAIN REID		9431 INDIAN TRAIL	FAIRVIEW RD	INDIAN TRAIL, NC 28079	Proration	0081386563	LFM1248	AUTHORIZED	765989112	Refund Generated due to proration on Bill #0081386563-2024-2024-0000-00	Vehicle Sold	#####	12/31/2024	001	TAX	(\$9.37)	\$0.00	(\$9.37)
															930	TAX	(\$1.15)	\$0.00	(\$1.15)
															016	TAX	(\$3.47)	\$0.00	(\$3.47)
															003	TAX	(\$1.00)	\$0.00	(\$1.00)
															005	TAX	(\$0.22)	\$0.00	(\$0.22)
															004	TAX	(\$1.68)	\$0.00	(\$1.68)
															002	TAX	(\$21.48)	\$0.00	(\$21.48)
			Refund		\$38.37														
THOMAS, KYLE KENNEDY	THOMAS, KYLE KENNEDY		2022 HOUNDSCROFT RD		INDIAN TRAIL, NC 28079	Proration	0050872184	FEL9435	AUTHORIZED	761853967	Refund Generated due to proration on Bill #0050872184-2023-2023-0000-00	Vehicle Sold	12/4/2024	12/5/2024	001	TAX	(\$1.13)	\$0.00	(\$1.13)
															600	TAX	(\$1.28)	\$0.00	(\$1.28)
															023	TAX	(\$0.31)	\$0.00	(\$0.31)
															003	TAX	(\$0.12)	\$0.00	(\$0.12)
															005	TAX	(\$0.03)	\$0.00	(\$0.03)
															004	TAX	(\$0.20)	\$0.00	(\$0.20)
															002	TAX	(\$2.60)	\$0.00	(\$2.60)
			Refund		\$5.67														
TOURTELLOTT, SANDRA QUEEN	TOURTELLOTT, SANDRA QUEEN		5023 SADDLE HORN TRL		WEDDINGTON, NC 28104	Proration	0036573402	EKV4268	AUTHORIZED	654251088	Refund Generated due to proration on Bill #0036573402-2023-2023-0000-00	Vehicle Sold	#####	12/13/2024	001	TAX	(\$9.91)	\$0.00	(\$9.91)
															800	TAX	(\$2.73)	\$0.00	(\$2.73)
															003	TAX	(\$1.06)	\$0.00	(\$1.06)
															005	TAX	(\$0.24)	\$0.00	(\$0.24)
															004	TAX	(\$1.77)	\$0.00	(\$1.77)
															002	TAX	(\$22.71)	\$0.00	(\$22.71)
																		Refund	
TUN, SAW ALUNG ZIN	TUN, SAW ALUNG ZIN	GAW GHIE PAH, NAW FIDALIA	2404 CASTLEBERRY CT	APT D	MONROE, NC 28110	Proration	0078980893	VDX2350	AUTHORIZED	766033000	Refund Generated due to proration on Bill #0078980893-2024-2024-0000-00	Insurance Lapse	#####	1/2/2025	001	TAX	(\$11.21)	\$0.00	(\$11.21)
															200	TAX	(\$34.52)	\$0.00	(\$34.52)
															200	VEHICLE FEE	\$0.00	\$0.00	\$0.00
															003	TAX	(\$1.20)	\$0.00	(\$1.20)
															005	TAX	(\$0.27)	\$0.00	(\$0.27)
															004	TAX	(\$2.00)	\$0.00	(\$2.00)
															002	TAX	(\$25.71)	\$0.00	(\$25.71)
			Refund		\$74.91														
VARGAS ORTIZ, VERONICA	VARGAS ORTIZ, VERONICA		317 E PARK RD	APT 101	INDIAN TRAIL, NC 28079	Proration	0079863375	RJE8862	AUTHORIZED	764664537	Refund Generated due to proration on Bill #0079863375-2024-2024-0000-00	Vehicle Sold	#####	12/23/2024	001	TAX	(\$1.11)	\$0.00	(\$1.11)
															600	TAX	(\$1.26)	\$0.00	(\$1.26)
															020	TAX	(\$0.37)	\$0.00	(\$0.37)
															003	TAX	(\$0.12)	\$0.00	(\$0.12)
															005	TAX	(\$0.03)	\$0.00	(\$0.03)
															004	TAX	(\$0.20)	\$0.00	(\$0.20)
															002	TAX	(\$2.55)	\$0.00	(\$2.55)
			Refund		\$5.64														
WENZEL, BRITTANY MICHELLE	WENZEL, BRITTANY MICHELLE		313 KONA LN		INDIAN TRAIL, NC 28079	Proration	0076732486	DEP5966	AUTHORIZED	762098533	Refund Generated due to proration on Bill #0076732486-2023-2023-0000-00	Vehicle Totalled	12/6/2024	12/9/2024	001	TAX	(\$25.94)	\$0.00	(\$25.94)
															600	TAX	(\$29.40)	\$0.00	(\$29.40)
															020	TAX	(\$7.60)	\$0.00	(\$7.60)
															003	TAX	(\$2.78)	\$0.00	(\$2.78)
															005	TAX	(\$0.62)	\$0.00	(\$0.62)
															004	TAX	(\$4.64)	\$0.00	(\$4.64)
															002	TAX	(\$59.48)	\$0.00	(\$59.48)
			Refund		\$130.46														
WESSEL, TYLER LOWELL	WESSEL, TYLER LOWELL		6121 PUMPERNICKEL LN		MONROE, NC 28110	Proration	0077218749	KJN1183	AUTHORIZED	763494011	Refund Generated due to proration on Bill #0077218749-2023-2023-0000-00	Vehicle Sold	#####	12/16/2024	001	TAX	(\$5.18)	\$0.00	(\$5.18)
															970	TAX	(\$0.41)	\$0.00	(\$0.41)
															026	TAX	(\$1.19)	\$0.00	(\$1.19)
															003	TAX	(\$0.55)	\$0.00	(\$0.55)
															005	TAX	(\$0.12)	\$0.00	(\$0.12)
															004	TAX	(\$0.93)	\$0.00	(\$0.93)
															002	TAX	(\$11.88)	\$0.00	(\$11.88)
			Refund		\$20.26														
WORTHY, DEANNE MARIE	WORTHY, DEANNE MARIE		8911 MILL GROVE RD		INDIAN TRAIL, NC 28079	Proration	0016596333	TFX5932	AUTHORIZED	654250902	Refund Generated due to proration on Bill #0016596333-2023-2023-0000-00	Vehicle Sold	#####	12/13/2024	001	TAX	(\$1.51)	\$0.00	(\$1.51)
															016	TAX	(\$0.46)	\$0.00	(\$0.46)
															003	TAX	(\$0.16)	\$0.00	(\$0.16)
															005	TAX	(\$0.04)	\$0.00	(\$0.04)
															004	TAX	(\$0.27)	\$0.00	(\$0.27)
															002	TAX	(\$3.46)	\$0.00	(\$3.46)
																		Refund	
XIANG, ANDING	XIANG, ANDING		2139 ABUNDANCE LN		WAXHAW, NC 28173	Proration	0059985802	RAS4795	AUTHORIZED	654068802	Refund Generated due to proration on Bill #0059985802-2023-2023-0000-00	Vehicle Sold	#####	12/12/2024	001	TAX	(\$10.12)	\$0.00	(\$10.12)
															015	TAX	(\$2.00)	\$0.00	(\$2.00)
															003	TAX	(\$1.00)	\$0.00	(\$1.00)
															005	TAX	(\$0.24)	\$0.00	(\$0.24)
															004	TAX	(\$1.81)	\$0.00	(\$1.81)
															002	TAX	(\$23.20)	\$0.00	(\$23.20)
																		Refund	