

Union County, NC

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



Meeting Agenda

Monday, December 16, 2024

6:00 PM

Board Room, First Floor

Board of Commissioners

Chair Melissa Merrell

Vice Chair Brian Helms

Commissioner Clancy Baucom

Commissioner Christina Helms

Commissioner Gary Sides

Closed Session - 5:15 PM

[24-864](#)

Closed Session

INFORMATION CONTACT:

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

- 1) pursuant to G.S. 143-318.11(a)(1), to prevent the disclosure of information that is privileged or confidential; and
- 2) pursuant to G.S. 143-318.11(a)(3), to consult with an attorney in order to preserve the attorney-client privilege.

FINANCIAL IMPACT:

None.

Opening of Meeting - 6:00 PM

Invocation - Commissioner Clancy Baucom

Pledge of Allegiance

Informal Comments

Public Hearing(s)

[24-824](#)

Public Hearing - Conditional Rezoning Petition (PUD amendment) CZ-2024-008 Dormie

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for proposed rezoning request.

If the Board wishes to take action consider the following:

TO APPROVE THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion: Adopt the Ordinance Approving Revision to the Official Zoning Map of Union County, North Carolina, and (ii) adopt the consistency and reasonableness statement for approval.

TO DENY THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion: Deny rezoning petition CZ-2024-008 from Dormie Equity Partners, LP; and (ii) adopt the consistency and reasonableness statement for denial.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This case is a rezoning request, petition CZ-2024-008, submitted by Dormie Equity Partners, LP (the "Applicant") for revision of the Union County Zoning Map by amending the approved Planned Unit Development district permit with associated conditions for a 2.53 acre parcel of land appearing on the tax map as tax parcel 06-201-007J in the Sandy Ridge Township under an existing legacy PUD6-B2 zoning district. The rezoning will include the following conditions:

1. Pursuant to Section 160D-108.1 of the North Carolina General Statutes and Section 80.020 of the Union County Unified Development Ordinance, the approval is vested for a period of five years.
2. Development will meet all requirements of the Union County Unified Development Ordinance.
3. The approval is limited to the site plan dated October 24, 2024.
4. The permitted uses on the site include all office uses, including medical office.
5. The site may include natural-surface pedestrian trails within areas that fall within a floodplain.
6. The site may include pedestrian-related improvements and plantings (including in the floodplain) as allowed under the Union County Unified Development Ordinance and other state, local, and federal regulations.

A community meeting was held October 8, 2024. Three residents attended the meeting and asked about the process for rezoning and parking requirements. No changes were made based on feedback. No additional comments have been received by staff.

The Land Use Board reviewed this request at its November 19, 2024, meeting. They unanimously recommended approval, citing consistently with the adopted plan and limited traffic impacts.

FINANCIAL IMPACT:

None.

Staff Recognition

[24-862](#)

Proclamation for Cervical Cancer Awareness Month (January 2025)

INFORMATION CONTACT:

Brian Matthews, County Manager, 704-292-2597

ACTION REQUESTED:

Adopt Proclamation proclaiming January 2025 to be Cervical Cancer Awareness Month in Union County.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

National Cervical Cancer Awareness Month was first recognized in 2002 and is observed every January. The U.S. Congress first introduced it in 1999 as a House Concurrent Resolution. Cervical Cancer Awareness Month is an annual observance held throughout the Month of January. It is intended to raise awareness of cervical cancer and to promote research into its cause, prevention, diagnosis, treatment, survivorship and cure.

FINANCIAL IMPACT:

None.

[24-843](#)

Service Award Recognition

INFORMATION CONTACT:

Julie Broome, Human Resources Director, 704.283.3869

ACTION REQUESTED:

A short video will play to recognize employee service award recipients for the fourth quarter (October, November, and December).

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The employee recognition program acknowledges employees for full-time continuous service at the following intervals: 5 years, 10 years, 15 years, 20 years, 25 years, and 30 years of service. We would like to recognize our fourth quarter recipients for their service to Union County Local Government.

FINANCIAL IMPACT:

None.

Consent Agenda

[24-793](#)

Deed Transfer - Union County Public Schools

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approved deed transfers to Union County Public Schools as construction has been completed.

PRIOR BOARD ACTIONS:

None

BACKGROUND:

When Union County Public Schools conducts major capital projects, they transfer the deed to Union County. The reason for this is that Union County is able to benefit from state sales tax reimbursement, and UCPS is not. At the end of the capital projects, the land is then deeded back to UCPS. This deed transfer will deed the following properties back to UCPS: Tax Parcel Nos. Monroe High School (09194029), Porter Ridge Middle School (08267003), Porter Ridge High School (08267003), Sun Valley High School (07072002), Western Union Elementary School (05033053), Piedmont High School (08129031), Transportation Facility (09372003F)

FINANCIAL IMPACT:

None.

24-845

Contract Renewal - Custom Mobile App

INFORMATION CONTACT:

Dorothy Thomas, Union County Sheriff's Office, Public Safety Finance Administrator, 704-283-3578

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Sheriff's Office (UCSO) smartphone application has proven to be an invaluable tool in our agency's commitment to enhancing public safety and keeping the community informed. With over 22,000 dedicated users, the app plays a critical role in our communication strategy, allowing us to disseminate essential information quickly and effectively to a broad audience. Our current reach extends to an average of 150,000-250,000 individuals weekly, enabling the UCSO to connect with our community on an unprecedented scale and ensuring that urgent updates and resources are accessible to all residents. The UCSO app facilitates a wide range of services and provides essential information in one easy-to-navigate platform. App users can access real-time traffic updates, locate registered sex offenders, find inmate information, browse adoptable animals, and access rehabilitation and domestic violence resources. Additionally, the app provides timely news releases, emergency notifications, and employment opportunities within the Sheriff's Office, offering a comprehensive suite of services that meet the diverse needs of our residents. Our app is continuously updated and refined based on user feedback, and we have received overwhelmingly positive responses from the community. This adaptability ensures that the app remains relevant, responsive, and highly effective as a tool for public

engagement and safety. Maintaining funding for the UCSO mobile application is essential to uphold the level of service that Union County residents have come to expect. Continued support will enable us to expand features, improve user experience, and further strengthen our communication with the community. By investing in this proven resource, the UCSO can continue to provide an accessible and effective platform that enhances public safety, empowers residents, and builds trust in law enforcement. The Sheriff's Office will collaborate with Procurement to explore solicitation options near the end of the renewal term.

The Union County Sheriff's Office has utilized the contractual services of OCV, LLC for Sheriff Smartphone Application since 2023. OCV, LLC has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional three years.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$15,782. Since this contract contains a three-year term, a total of \$47,346 is estimated to be spent. Funding is available in the adopted FY2025 budget with future expenditures subject to annual BOCC budget appropriation.

24-861

Purchase - Body Armor from Lawmen's Distribution, LLC

INFORMATION CONTACT:

Dorothy Thomas, Sheriff's Office, Public Safety Finance Administrator,
704-283-3578

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Sheriff's Office would like to purchase Safariland body armor from Lawmen's Distribution, LLC. The body armor purchase replaces old worn existing body armor and new hires. Purchasing from Lawmen's Distribution, LLC ensures body armor conformity throughout the agency. N.C.G.S 143-129(e)(3) and N.C.G.S 143-129(e)(9) allow local governments to make purchases through a competitively bid North Carolina Statewide Term Contract or a Group Purchasing Program. The purchase of the Body Armor will be made using North Carolina Statewide Term Contract 680C quoted by Lawmen's Distribution, LLC.

FINANCIAL IMPACT:

The anticipated cost for the Body Armor is \$99,524.95 and is budgeted accordingly for FY 2025.

24-834

NC Department of Public Safety - Juvenile Crime Prevention Council

Funding FY 2025**INFORMATION CONTACT:**

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

ACTION REQUESTED:

1) Approve revised County Funding Allocation Plan FY 2024-2025, 2) authorize the Finance Director to approve the funding plan, grant agreements and documents related to such grant agreements during their terms, and 3) approve Budget Amendment 16.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

Funding for JCPC programs is generally adopted in the State Budget and assigned to County programs by a formula grant. Normally, a county JCPC approves a budget for the upcoming fiscal year, which is then submitted to the North Carolina Department of Public Safety Juvenile Justice and Delinquency Prevention (the DJJ). The attached funding plan was developed and approved by the JCPC Board and represents the Board's plan for how the funds will be spent for the 2024-2025 fiscal year. This request will be included in the State's DJJ budget which is being planned for 2024-2025.

The JCPC Board approved \$476,439 for County programs for the 2024-2025 fiscal year. The Revised Funding Plan allocates funding from the State to the following programs: Life Connections D-A-S-H Counseling Services \$146,593, Transforming Youth Movement Get Hired-Youth Employability \$40,000, Transforming Youth Movement SHIFT Restitution/CS \$45,000, Aspire Youth and Family Kids at Work \$70,312, JCPC Administration \$9,534, Arts Related Innovative Student Empowerment (ARISE) Union-KRE8IVU \$60,000, Union County Community Service's and Outreach Parenting Support \$17,000 (increase by \$6,250), and \$0 (decrease of 6,250) of unallocated funds that will be reassigned later in the fiscal year as needed.

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

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

FINANCIAL IMPACT:

The County will provide \$6,738 in local in-kind match for the Union County Parenting Support Program. No other County funding is required for local funding or the local in-kind match for all other JCPC Programs.

24-835**Budget Amendment - WIC Program, Community Support and Outreach****INFORMATION CONTACT:**

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$47,250 of additional Agreement Addendum funding for WIC Client Services to the Community Support and Outreach Division's operating budget and 2) approve Budget Amendment #13.

PRIOR BOARD ACTIONS:

- 1) July 17, 2023, Regular Meeting, Agenda Item # 23-444 - Contract Amendment - WIC Program Nutritionist Services.
- 2) June 17, 2024, Regular Meeting, Agenda Item # 24-400 - Contract Amendment - WIC Program Nutritionist Services.
- 3) July 15, 2024, Regular Meeting, Agenda Item # 24-484 - Budget Amendment - WIC Program Nutritionist Services.
- 4) November 18, 2024, Regular Meeting, Agenda Item # 24-781 - Contract Amendment- WIC Program Nutritionist Services

BACKGROUND:

The Special Supplemental Nutrition Program for Women, Infants and Children (WIC) is part of the Union County Human Services Agency's Community Support and Outreach Division. WIC serves to safeguard the health of low-to-moderate income pregnant, postpartum, and breastfeeding women, infants and children up to age five (5) who are at nutritional risk. The WIC program provides nutritious foods to supplement diets, referrals to health care and education on healthy eating from specially trained WIC nutritionists. As a result of COVID-19 and other current events, many families have been faced with economic hardships, leading to a significant sustained increase in the need for WIC services. In FY2020, our clinic served an average caseload of 2,909 clients per month. Year-to-date in FY2025, our monthly average increased to 4,260 clients, representing a growth of over 46%. To ensure that clients and new applicants are served in accordance with Federal regulations, we have contracted with Nutrition Plus, who provides us with one FTE of a WIC Nutritionist. Our original contract with Nutrition Plus, Contract #7982, was executed on December 1, 2022 with a not to exceed amount of \$25,000; an amendment was approved on April 13, 2023 adding \$24,500 to the not to exceed amount of \$25,000, for a total of \$49,500. Neither of these required board action. On July 17, 2023, the BOCC approved a contract amendment, which increased the not to exceed amount on the contract from \$49,500 to \$107,500 and extended the contract end date to

June 30, 2024. An amendment was approved on January 25, 2024 adding \$31,040, which did not require board action and increased the not to exceed amount to \$138,540. On June 17, 2024, the BOCC approved a contract amendment, which increased the not to exceed amount on the contract from \$138,540 to \$163,540 and extended the term through September 30, 2024. To address the sustained high need, the North Carolina Department of Health and Human Services (NC DHHS) has continually adjusted the allocation of funds to WIC clinics that serve more than 100% of the caseload assigned by the state. Consequently, Union County WIC received an overall funding boost for FY2025. As a result, we utilized \$17,349 from the initial AA increase to increase the not to exceed on the Nutrition Plus of Greenville, Inc. contract from \$163,540 to \$180,889 and extended the contract expiration date with Nutrition Plus from September 30, 2024 to June 30, 2025. This did not require board action. An additional WIC AA increase of \$47,250 was announced on September 30, 2024 and the total not to exceed amount was increased from \$180,889 to \$228,139 at the last board meeting. We are asking for the board to approve Budget Amendment #13 for the additional \$47,250.

The Human Services Agency Community Support and Outreach Division has utilized the contractual services of Nutrition Plus for WIC Program Nutritionist since December 2022. Nutrition Plus of Greenville, Inc has been effective and efficient in meeting our service needs.

FINANCIAL IMPACT:

Additional funding of \$47,250 is awarded at 100% with no required County match.

24-839

Budget Amendment - Child Fatality Prevention Team

INFORMATION CONTACT:

Dennis Joyner, Human Services Agency, Public Health Director,
704-296-4801

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$2,400 in additional state funding from the NC Division of Public Health for the Union County Child Fatality Prevention Team (Agreement Addendum 701) and 2) approve Budget Amendment 17.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

North Carolina Session Law (NCSL) 2023-134 enacted changes to strengthen the state's child fatality prevention system which included the establishment of a State Office of Child Fatality Prevention within the Division of Public Health (DPH), Department of Health and Human Services (the Department), made changes to the Child Fatality Prevention System, and made it mandatory to report child fatalities into the National Fatality Review Case Reporting System (NFR-CRS).

The NFR-CRS is a web-based system hosted by the National Center for Fatality Review and Prevention within the Center for National Prevention Initiatives of the Michigan Public Health Institute (MPHI) and is used by many states to provide child death review teams with a data system for capturing, analyzing, and reporting of information shared at a child death or serious injury review.

Per NCSL 2023-134: "Not later than July 1, 2025, the Department shall ensure through its State Office of Child Fatality Prevention that all Local Teams [including Local Health Departments/Districts] have been provided guidelines and training addressing their participation in the NFR-CRS, and Local Teams shall begin utilizing the System for case reporting as specified in G.S. 7B-1413.5." The Union County Human Services Agency coordinates our single county, multidisciplinary child death review team pursuant to Article 14 of Chapter 7B of the General Statutes.

This Agreement Addendum provides funding for the Local Health Department to prepare and begin using the NFR-CRS. Funds were appropriated by the North Carolina General Assembly to support implementation of the changes authorized by NCSL 2023-134 to restructure child death reviews by Local Teams and to offset the costs associated with Local Team participation in NFR-CRS.

FINANCIAL IMPACT:

The County will receive \$2,400 in FY2025 funding from the NC Division of Public Health. No County match is required.

24-846

Contract Renewal - Dental Laboratory Services

INFORMATION CONTACT:

Dennis Joyner, Human Services Agency - Department of Public Health, Director, 704-296-4801

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Human Services Agency's Public Health Department provides various dental clinic services for patients that must be processed by an "outside" laboratory such as dentures. Brantley Dental Laboratory currently processes lab services for the Public Health Department through contract #8619. A requested third amendment for \$25,000 will cover a one-year term and will result in a cumulative spend with the vendor that exceeds the County Manager's \$50,000 allowable signing authority, therefore, BOCC approval of Contract Amendment #3 is required.

The Public Health Department has utilized the contractual services of Brantley Dental Laboratory for services since November 2020. The contractor has been effective and efficient in meeting our service & patient care needs, and we are requesting to continue this service for an additional one-year term. The Department will collaborate with Procurement for solicitation options in the future.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$25,000.00 and is budgeted accordingly for FY2025, with future expenditures subject to annual BOCC budget appropriation.

24-852

Grant Application - Transportation FY2026 Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program

INFORMATION CONTACT:

Theresa Torres, Human Services Agency, Transportation Director,
704-283-3598

ACTION REQUESTED:

Authorize the County Manager: to 1) submit the 5310 Urbanized Area Grant application and make necessary assurances and certifications associated with the grant application, 2) upon award of the grant, to negotiate and execute an agreement, and 3) upon receipt of the grant funds, to recognize, receive, and appropriate the awarded amount to the Transportation budget, all as substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Section 5310 program (49 U.S.C. 5310) provides formula funding to states to assist private nonprofit groups meet the transportation needs of older adults and people with disabilities when transportation service is unavailable, insufficient, or inappropriate to meet the needs of these residents. The 5310 program aims to remove barriers to transportation services and expand mobility options for seniors and individuals with disabilities by supporting services planned, designed, and carried out to meet the unique transportation needs of these residents in all areas - large urbanized (over 200,000), small urbanized (50,000-200,000), and rural (under 50,000). Funds are apportioned based on each state's share of the population, then direct recipients manage and distribute funds to sub-recipient projects.

The Human Services Agency Transportation Department will submit the grant application as a sub-recipient through the Charlotte Area Transit System (CATS), and our local agreement will be with the City of Charlotte. Union County's grant application will leverage our Home and Community Care Block Grant (HCCBG) funding to serve as the local match required to enable us to obtain the additional 5310 grant funding,

thereby ensuring more seniors can access needed services by utilizing our transportation system. Transportation staff has the capability to manage this grant and has been receiving and managing this 5310 funding since January 2016. FY2026 grant funding will allow us to continue meeting the needs of current and future residents who are eligible for services under this funding structure. Our goal is to serve 200+ seniors age 65+ and/or age 50+ disabled individuals currently being served by our system under this funding.

The 5310 grant requires a 50% Federal/ 50% Local cost split for demand response service operations. The performance period is for two funding years, meaning funds awarded during a given fiscal year can be drawn down for two years after the start of the award's fiscal year.

FINANCIAL IMPACT:

The total 5310 Grant operating request of \$400,000 for the two-year period from July 1, 2026, through June 30, 2028, is 50% Federal Grant (\$200,000) and 50% Local Match (\$200,000).

24-847

Contract - Architectural Services for UC Water Operations Center Expansion

INFORMATION CONTACT:

Christopher J. Boyd, Facilities and Fleet Management, Director,
704-283-3868

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This request is to approve a contract with Progressive Architecture Engineering, P.C. to complete the building and site design for the new UC Water Operations Center Expansion and Renovation project. The scope of work will include the design of a building addition, or stand-alone building, of approximately 30,000 gsf and renovate close to 3,000 gsf of space in the existing Operations Center.

The designer will be responsible for verification of the previously conducted space needs analysis, development of the building program requirements, full architectural and engineering design and construction administration. The designer will also be tasked with coordination and teaming with the Construction Manager at Risk to be selected by the County.

The Facilities and Fleet Management Department partnered with the

Procurement Department to issue Request for Qualifications No. 2025-005, Architectural Services, Union County Water Operations Center Expansion and Renovation Project. On September 10, 2024, eleven (11) qualifications packages were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. The top four (4) firms were invited to shortlist interview/presentations. As a result, the team requests approval to enter into a contract with Progressive Architecture Engineering, P.C. Staff recommends the Board approve the contract with Progressive Architecture Engineering, P.C. the amount of \$870,260.00 to complete the building design and construction administration.

FINANCIAL IMPACT:

The cost of this contract is \$870,260.00. There are sufficient funds in the UC Water Ops Center Expansion capital account, 60186019, to cover this expense.

24-813

Allocate Additional FTE to Information Technology

INFORMATION CONTACT:

Christopher Liersaph, Information Technology, Assistant Director,
704-292-2520

ACTION REQUESTED:

Authorize an additional 0.46 FTE to create a full-time position in Information Technology.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Currently, the Union County Information Technology Department includes two part-time vacant positions, one as an intern (position 422999 at 0.06 FTE) and the other administrative support (position 421098 at 0.48 FTE). Both positions are helpful to the department's operations but are limited by their part-time status, resulting in inefficiencies and less focus on serving our customers. With the county's expanded dependence on information technology, the department is seeking an additional 0.46 FTE to consolidate the two part-time positions into one full-time IT Systems Specialist position that will provide entry-level technical support. This change will improve the availability of technical support for our growing user base. IT has had an ongoing relationship with South Piedmont Community College and will continue to work with them to feed our remaining internship position and possibly look to SPCC graduates to fill this potential position.

FINANCIAL IMPACT:

No additional funding required. Funding exists in the current FY2025 Information Technology budget.

24-830

October 2024 NCVTS Motor Vehicle Tax Report

INFORMATION CONTACT:

Vann Harrell, Tax Administration, Tax Administrator, 704-283-3478;

Kristen Foxworth, Tax Administration, Deputy Tax Administrator,
704-283-3591

ACTION REQUESTED:

Approve the October 2024 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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.

FINANCIAL IMPACT:

\$6,884.98

24-825

Budget Amendment - County Manager's Office

INFORMATION CONTACT:

Megan Parks, County Manager's Office, Director Strategy & Innovation,
704-283-2578

ACTION REQUESTED:

Adopt Budget Amendment #6.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Strategy & Innovation team within the County Manager's office is comprised of staff who were reclassified from other County Departments including Human Services (4 staff members) and the Budget Office (1 staff member). This budget amendment will move the salaries and benefits of those staff to the County Manager's Office budget.

FINANCIAL IMPACT:

There is no financial impact as funds are being transferred from one County Department to another.

24-840

Amendment to the Union County Pay and Classification Plan

INFORMATION CONTACT:

Julie Broome, Human Resources, Director, 704-283-3869; Jason Kay,
County Attorney, 704-283-3784

ACTION REQUESTED:

Approve revision of the Union County Pay Plan to include new job classification titles, pay grades, and one new position.

- 1) Add the following classification and associated pay grade:
 - a. Environmental Health Division Manager - pay grade Q
 - b. Sheriff's Office Legal Counsel - pay grade S
- 2) Remove the following classification and associated pay grade:
 - a. Director, Environmental Health - pay grade Q
 - b. Training Supervisor - pay grade L
 - c. Trainer - pay grade J

3) Add one (1) Assistant County Attorney full-time equivalent (FTE) position

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Updates to the Union County Pay Plan are necessary to add, update, and remove job classification titles to align with current and future organizational needs.

For certain property acquisition and condemnation pre-litigation services related to Union County Water, the County has historically contracted with outside counsel to provide such services. However, due to the volume of this work and time needed to address these issues, bringing these legal services in-house will provide overall benefit to the County and reduce costs. With the addition of one (1) Assistant County Attorney position in the County Attorney's Office, this change will provide improved budget stability, increased efficiency, and strengthened communication and collaboration opportunities. The monetary savings yielded by shifting away from the contract legal services model will fully fund the new position, allow for significantly decreased hourly legal service costs, and increase the County's ability to meet the requirements of this work in a cost-effective manner. The position will be funded through the Water and Sewer Public Enterprise fund. The position will be filled, trained, and deployed as soon as practicable while taking into account department and service transition needs. No new funding is required for the position, and it is projected to reduce overall expenses.

FINANCIAL IMPACT:

No additional funds required.

24-856

Contract Amendment - Audit Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the Board Chair 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 Board Chair's discretion.

PRIOR BOARD ACTIONS:

- 1) April 18, 2022, Regular Meeting, Agenda Item # 22-212 - Approved contract for FY2022 Financial Audit and Authorized Chairman to execute.
- 2) May 5, 2023, Regular Meeting, Agenda Item # 23-236 - Approved FY2023 Financial Audit and authorized Chairman to execute.
- 3) April 1, 2024, Regular Meeting, Agenda # 24-209 - Approved FY2024 Financial Audit and Authorized Chairman to execute.

BACKGROUND:

Through Request for Proposals (RFP) 2022-039, Cherry Bekaert, LLP was awarded the financial audit contract to provide auditing services for Union County. As required by the North Carolina Local Government Commission (LGC), the auditing contract must be awarded on an annual basis with approval from the Board of Commissioners. This request is to award a contract to Cherry Bekaert to perform the financial audit of the County's accounting records for FY2024.

The contract terms for auditing services includes fee for testing of five major grant programs for single audit testing. During FY2024, the County saw an increase in major grant programs resulting in a total of eleven programs tested. The original contract approved by the BOCC in April estimated there would be an additional four programs tested resulting in a contract amount not to exceed \$146,000. The additional major programs tested resulted in not to exceed amount of \$156,000 requiring an amendment to the FY2024 audit contract. The contract amendment requires the Chair's signature based on the Local Government Commission audit contract regulations.

FINANCIAL IMPACT:

The total cost will be \$156,000: \$126,000 to perform the financial audit and which includes testing for five Single Audit grant programs, as well as \$5,000 for each Single Audit program over five. The total not to exceed amount is increasing overall by \$10,000.

24-848

Resolution - Adopt Board of Commissioners' 2025 Regular Meeting Schedule

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt the Resolution for the Regular Meeting Schedule of the Union County Board of Commissioners for 2025.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This resolution is for the adoption of the Board of Commissioners' meeting schedule for 2025, which includes its regular meetings as shown on Attachment "A" to the resolution.

FINANCIAL IMPACT:

None.

24-853

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Draft minutes have been provided to the Board for review and approval on the consent agenda.

FINANCIAL IMPACT:

None.

Information Only**24-828****Tax Refunds, Releases and Prorations Approved by Finance Officer****INFORMATION CONTACT:**

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than \$100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for October 2024 NCVTS releases and refunds less than \$100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.

24-857**Monthly Update - Wastewater Treatment Capacity****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Receive status update on wastewater treatment capacity for the Twelve Mile Creek, Crooked Creek, Olde Sycamore, Tallwood, and Grassy Branch facilities.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Water is closely monitoring the wastewater treatment capacities at our Water Reclamation Facilities. Permitting Capacity is evaluated using the Actual Plant Flows plus the Permitted/Obligated Flows (unconnected). Union County Water was asked to provide regular updates. Plant flow information through November 2024 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 72.4%
- Percent of Actual + Permitted Flows = 92.3%
- Actual Flows (MGD) = 5.427
- Actual + Permitted Obligated Flows (MGD) = 6.926

Crooked Creek

- Percent of Actual Flows = 60.0%
- Percent of Actual + Permitted Flows = 90.6%
- Actual Flows (MGD) = 1.140
- Actual + Permitted Obligated Flows (MGD) = 1.722

Olde Sycamore

- Percent of Actual Flows = 30.7%
- Percent of Actual + Permitted Flows = 30.7%
- Actual Flows (MGD) = 0.046
- Actual + Permitted Obligated Flows (MGD) = 0.046

Tallwood

- Percent of Actual Flows = 46.0%
- Percent of Actual + Permitted Flows = 46.0%
- Actual Flows (MGD) = 0.023
- Actual + Permitted Obligated Flows (MGD) = 0.023

Grassy Branch

- Percent of Actual Flows = 96.0%
- Percent of Actual + Permitted Flows = 98.0%
- Actual Flows (MGD) = 0.048
- Actual + Permitted Obligated Flows (MGD) = 0.049

In addition to the wastewater treatment capacities, flow volumes associated with development projects that are in the planning and review process within the Twelve Mile Creek and Crooked Creek WRF service areas are provided for information as well. Development flow volumes through November 2024 are summarized in the attached tables.

FINANCIAL IMPACT:

None.

Business

[24-762](#)

Opioid Settlement Funding Plan Update

INFORMATION CONTACT:

Michelle Lancaster, Consultant

ACTION REQUESTED:

- 1) Receive information on the County’s Opioid Settlement Plan,

2) Update the Pay and Classification plan to include a new job classification as follows:

- Opioid Settlement Program Coordinator / Strategy Analyst - Pay Grade M

3) Authorize the addition of one FTE (full-time equivalency) in the County Manager's Office for the following job classification:

- 1 Opioid Settlement Program Coordinator / Strategy Analyst

4) Adopt Budget Amendment #18

PRIOR BOARD ACTIONS:

1) June 19, 2023, Regular Meeting, #23-367 - Adopt the Resolution to Direct the Expenditure of Opioid Settlement Funds and authorize the County Manager to negotiate and execute agreements consistent with the agenda item.

2) July 17, 2023, Regular Meeting, #23-461 - Ratify and Re-Adopt Resolution

3) October 2, 2023, Regular Meeting, #23-692 - Re-Adopt Resolution

BACKGROUND:

North Carolina participated in the national opioid settlement. The NCACC and NCDOJ formed a partnership to ensure that proceeds are provided to local jurisdictions to provide programs and services that directly impact those who have been most impacted by opioids. Union County entered into two Memorandums of Agreement (MOAs) with the state that outline the amount to be received and how the proceeds can be used. The agreements govern how NC would use the proceeds of any future national settlement or bankruptcy resolution with drug distributors and opioid manufacturers. The Opioid litigation settlement funds will be received over an 18-year period.

A settlement has been reached in a class action lawsuit against McKinsey & Company, Inc., and related entities. Allocations to eligible subdivisions, including Union County, were made following the same methodologies as applied in the national opioid settlement with Janssen Pharmaceuticals, a Wave One opioid settlement. For prior Wave One and Wave Two opioid settlements, decisions on how settlement funds will be allocated within a state are subject to the North Carolina Memorandum of Agreement (MOA), including supplemental agreements to the MOA, on the allocation, use, and reporting of funds. However, funds from the McKinsey settlement are not subject to the MOA or any supplemental agreements to the MOA since NC Department of Justice was not involved in this litigation. Thus, these funds are not appropriated within the County's Special Revenue Fund for Opioid Settlement. As a recipient of this allocation, Union County is required to use the settlement funds exclusively for approved uses designed to abate the opioid epidemic.

Staff is providing an update on the detailed plan for the use of opioid settlement funds approved by the Board of Commissioners at its June 19, 2023, Regular Meeting. Part of the update will include a recommendation

to appropriate \$5,000 of McKinsey Settlement Funds for audit testing that was required as part of the County's Single Audit for FY2024.

FINANCIAL IMPACT:

Union County will receive an allocation of \$86,677.12 in FY25, which will be used to fund the new FTE and additional audit testing that was required for opioid funds (\$5,000).

24-823

South Piedmont Regional Autopsy Center Update

INFORMATION CONTACT:

Michelle Lancaster, Consultant

ACTION REQUESTED:

Receive information.

PRIOR BOARD ACTIONS:

May 20, 2024, Regular Meeting, Agenda Item #24-354 - Authorize the County Manager to negotiate and execute an agreement with the state to receive directed grant funds for the facilities and operations to establish a new South Piedmont Regional Medical Examiner's Office

BACKGROUND:

In May 2024, the County entered into an agreement with the Office of the State Medical Examiner to receive a directed grant of \$20,000,000 in nonrecurring state appropriations, (\$15,000,000 in State Fiscal Year (SFY) 2023-2024, and \$5,000,000.00 in SFY 2024-25), for the leasing of facilities and to initiate the renovation and upfitting of an agreed upon space to establish a new South Piedmont Regional Medical Examiner's Office that shall serve at least all of the following counties: Anson, Cabarrus, Gaston, Montgomery, Moore, Richmond, Rowan, Stanly, and Union. Additionally, as part of the agreement, the County receives a directed grant of \$2,000,000 recurring in SFY 2023-24, and SFY 2024-25, for operational costs and equipment associated with the establishment of a county-operated regional autopsy center.

FINANCIAL IMPACT:

None.

24-826

Legislative and State Budget Updates

INFORMATION CONTACT:

Michelle Lancaster, Consultant

ACTION REQUESTED:

Receive an update on the 2024 Legislative Agenda and state budget items affecting Union County.

BACKGROUND:

Staff will provide the latest information to the Board of Commissioners regarding legislative activities of the NC General Assembly and items of interest in the State's budget.

FINANCIAL IMPACT:

None.

[24-850](#)**Senior Nutrition Home Delivery Waitlist****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Receive information from staff.

PRIOR BOARD ACTIONS:

December 2, 2024, Regular Meeting, Agenda Item # 24-854 - Board added discussion regarding Senior Nutrition Home Delivery Waitlist to Business agenda.

BACKGROUND:

During the December 2, 2024, meeting of the Board of County Commissioners, the Board added an item, to the Business portion of the agenda, related to the Senior Nutrition Home Delivery Program's Waitlist. Based on a request from Commissioner Sides, there was a consensus among the Board for staff to bring additional information about the program back at the December 16, 2024 meeting.

FINANCIAL IMPACT:

None at this time.

[24-858](#)**Consider Accepting the Offer to Purchase County Owned Property****INFORMATION CONTACT:**

Brian Matthews, County Manager, 704-292-2597

ACTION REQUESTED:

- (1) The first option is to reject the current bid;
- (2) If the Board does not wish to reject the current bid, then the Board additionally has the following options:
 - a. Authorize additional upset bid periods; or
 - b. Accept \$50,000 for the sale of the Reverter interest in parcel #09-366-006 and (i) authorize the sale of the real property, in accordance with the Board's "Resolution Authorizing the Use of the Upset Bid Process for the Sale of a Future Interest in Certain Real Property," dated October 7, 2024, to the final highest responsive, responsible bidder, Union Academy, in the amount of \$50,000; and (ii) authorize the County Manager to negotiate and execute any documentation necessary to effectuate such sale.

PRIOR BOARD ACTIONS:

- 1) October 7, 2024, Regular Meeting, Agenda item # 24-686 - Resolution authorizing Upset Bid Process for a Future Interest Certain Real Property adopted by the Board.
- 2) November 4, 2024, Regular Meeting, Agenda item # 24-767 - 1) Board authorized an additional upset bid period for disposal of this real property and 2) directed the Clerk to advertise a new upset bid period in accordance with NCGS 160A-269.

BACKGROUND:

Union County currently owns a future, executory interest in approximately

8.15 acres of real property on Old Charlotte Hwy in Monroe, North Carolina, identified as Tax Map #09-366-006 ("Reverter"). Union Academy currently holds a fee simple interest to this property, subject to Union County's Reverter. The County currently does not actively use the property for any governmental functions. The Reverter interest does not vest unless the earliest of the following events occurs: Union Academy's charter is terminated or not renewed for any reason, or Union Academy ceases to occupy said property. County staff desires for the Board to consider the sale of the Reverter and to receive proceeds from the sale.

North Carolina General Statutes allow the disposition of interests in real property by local governments through a variety of means, including advertisement for sealed bids; negotiated offer, advertisement, and upset bid; public auction; or exchange.

Staff has previously received an offer of \$50,000 to purchase the Reverter. The required five percent deposit was received by the clerk on October 18, 2024. The Board authorized the use of the upset bid process for the sale of this Reverter, as set forth in N.C.G.S. § 160A-269. A 10-day period for upset bids to be received for the Reverter was advertised and ended on October 22, 2024, at 5pm.

No upset bids were received. The Board authorized an additional upset bid period at the November 4, 2024, regular meeting. A 10-day period for upset bids to be received for the Reverter was advertised and ended on November 19, 2024. No new bids were received during the additional upset bid period. Once a 10-day period has passed without any qualifying upset bids, the amount of the final high bid shall be reported back to the Board. The Board shall determine whether or not to accept the high bid no later than ninety (90) days after the final upset bid period has passed. Staff is bringing this matter to the Board to consider whether to accept the current offer of \$50,000 from Union Academy.

FINANCIAL IMPACT:

Revenue depends upon acceptance of any final high bid amount.

24-868

Contract Amendment - MRL Consulting, LLC

INFORMATION CONTACT:

Patrick Niland, Deputy County Manager, 704-283-3630

ACTION REQUESTED:

1) Approve the amendment with MRL Consulting, LLC, and 2) authorize the County Manager to terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

February 5, 2024 - Regular Meeting, Agenda Item #24-094 - The Board approved an extension of the agreement for 11 months, with additional contract terms stating that the County would be MRL Consulting's primary client, that any additional clients be disclosed to and approved by the

County, and that any future contract renewal or extension of term options be approved by the Board, with the County Manager authorized to terminate the agreement if deemed in the best interest of the County.

BACKGROUND:

The County Manager's Office is requesting an extension of the consulting services Agreement with MRL Consulting, LLC, led by Michelle Lancaster, until December 31, 2025. Since her retirement from employment with Union County, Michelle has been an invaluable asset to the County, providing her expertise in critical ongoing projects to help usher those projects toward successful completion. The consulting services currently listed in the Agreement include: assistance with opioid settlement funding, liaising with the County's legislative delegation at the General Assembly and with the County's contract lobbyist, assistance with planning and coordination of provider(s) in the Union County Public Health Department Inmate Health Program due to retirements, facilitation and assistance with coordination efforts regarding the potential Union County Jail expansion project, assisting with the Regional Autopsy Center, and other projects as requested. Some of these listed services have been completed or have been updated over time, as allowed by the Agreement, due to changing County plans or priorities. The consulting services are currently being provided at a cost of \$6,000 per month, for a total of \$102,000 from the Agreement's effective date on August 1, 2023, through December 31, 2024. The amendment requested would revise the consulting services provided by MRL Consulting, narrowing the focus of the services to one key project: helping to get the new Regional Autopsy Center up and running. MRL Consulting has been effective and efficient in meeting our service needs, and we believe the County can greatly benefit from her services on this important regional project. Because the consulting services will be narrower in scope, the monthly fee for this service is being revised to \$4,500 per month. In order to ensure a successful start to the new Regional Autopsy Center over the coming months, we are requesting to continue contracting with MRL Consulting for an additional 12 months. The Agreement currently ends on December 31, 2024; this amendment would extend the term through December 31, 2025.

FINANCIAL IMPACT:

The anticipated annual cost for this contract extension is \$54,000 and is budgeted accordingly for FY2025.

24-851

Appointment of Commissioners to Board and Committees

INFORMATION CONTACT:

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

ACTION REQUESTED:

Appoint Commissioners to fill positions on Boards and Committees.

PRIOR BOARD ACTIONS:

December 2, 2024, Regular Meeting, Agenda Item # 24-819 - Board appointed Commissioner Gary Sides to the Monroe Union County

Economic Development Commission.

BACKGROUND:

None.

FINANCIAL IMPACT:

None.

County Manager's Comments

Commissioners' Comments

Adjournment



Union County, NC

Staff Report

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

File #: 24-864

Agenda Date: 12/16/2024

TITLE:

Closed Session

INFORMATION CONTACT:

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

- 1) pursuant to G.S. 143-318.11(a)(1), to prevent the disclosure of information that is privileged or confidential; and
- 2) pursuant to G.S. 143-318.11(a)(3), to consult with an attorney in order to preserve the attorney-client privilege.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 24-824

Agenda Date: 12/16/2024

TITLE:

Public Hearing - Conditional Rezoning Petition (PUD amendment) CZ-2024-008 Dormie

INFORMATION CONTACT:

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

ACTION REQUESTED:

Conduct public hearing for proposed rezoning request.

If the Board wishes to take action consider the following:

TO APPROVE THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion: Adopt the Ordinance Approving Revision to the Official Zoning Map of Union County, North Carolina, and (ii) adopt the consistency and reasonableness statement for approval.

TO DENY THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion: Deny rezoning petition CZ-2024-008 from Dormie Equity Partners, LP; and (ii) adopt the consistency and reasonableness statement for denial.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This case is a rezoning request, petition CZ-2024-008, submitted by Dormie Equity Partners, LP (the "Applicant") for revision of the Union County Zoning Map by amending the approved Planned Unit Development district permit with associated conditions for a 2.53 acre parcel of land appearing on the tax map as tax parcel 06-201-007J in the Sandy Ridge Township under an existing legacy PUD6-B2 zoning district. The rezoning will include the following conditions:

1. Pursuant to Section 160D-108.1 of the North Carolina General Statutes and Section 80.020 of the Union County Unified Development Ordinance, the approval is vested for a period of five years.
2. Development will meet all requirements of the Union County Unified Development Ordinance.
3. The approval is limited to the site plan dated October 24, 2024.

4. The permitted uses on the site include all office uses, including medical office.
5. The site may include natural-surface pedestrian trails within areas that fall within a floodplain.
6. The site may include pedestrian-related improvements and plantings (including in the floodplain) as allowed under the Union County Unified Development Ordinance and other state, local, and federal regulations.

A community meeting was held October 8, 2024. Three residents attended the meeting and asked about the process for rezoning and parking requirements. No changes were made based on feedback. No additional comments have been received by staff.

The Land Use Board reviewed this request at its November 19, 2024, meeting. They unanimously recommended approval, citing consistently with the adopted plan and limited traffic impacts.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

**Union County
Planning Department**
500 N Main Street - Suite 70
Monroe, NC 28112
T 704.283.3565
E UCPlanning@unioncountync.gov

General Information

Project Address ~~None~~ Reed Road City N/A Waxhams State NC Zip N/A

Tax Parcel ID 06201007J Current Zoning Designation PUD6-B2 Total Acres 2.53

Proposed Zoning Designation PUD6-B2 Date Submitted July 17, 2024

Contact Information

Applicant Name Dormie Equity Partners, LP c/o Rob Taylor

Address 1213 West Morehead Street, 5th Floor City Charlotte State NC Zip 28208

Phone 704-926-7570 Fax N/A Email rob@taylor-capital.com

Property Owner Name MSC REA OUTPARCEL, LLC c/o Matt Shapiro

Address 725 Park Cedar Drive City Matthews State NC Zip 28105

Phone 704-578-5225 Fax N/A Email MShapiro@mstarproperties.com

Applicant's Certification

See attached Signature Page

Signature _____ Date _____ Printed Name/Title _____

Owner's Certification

See attached Signature Page

Signature _____ Date _____ Printed Name/Title _____

Union County Office Use Only:

Case Number: 2024-CZ-008 Dormie Date Received: 7-17-24

Amount of Fee (\$~~900~~): BBA Fee Ok: BBA Received by: BBA
1,000

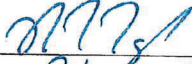
Contact Bjorn Hansen to begin the process. T. 704.283.2690 E. Bjorn.hansen@unioncountync.gov



**This document is only valid from July 1, 2023 - June 30, 2024

[Signature Page of Applicant to Application filed by Dormie Equity Partners, LP]

DORMIE EQUITY PARTNERS, LP

By: 
Name: Robert Taylor
Title: Managing Partner
Date: 6/13/24

[Signature Page of Property Owner to Application filed by Dormie Equity Partners, LP]

MSC REA OUTPARCEL, LLC, a Delaware
limited liability company

By: Matthew J Shapiro
Name: Matt Shapiro
Title: President
Date: 6-24-24

July 17, 2024

Mr. Bjorn Hansen, Senior Planner
Union County Planning Department
500 North Main Street, Suite 170
Monroe, NC 28112

Re: Letter of Intent
Application for Conditional Rezoning Filed by Dormie Equity Partners, LP for a 2.53 Acre
Site Located on Rea Road in Union County

Dear Bjorn:

I hope this letter finds you well.

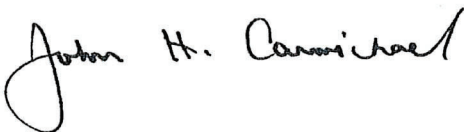
Dormie Equity Partners, LP ("Dormie") has filed an Application for Conditional Rezoning with the Union County Planning Department for the purpose of requesting site plan and building elevation approval for a proposed medical office building to be located on a 2.53 acre site located on Rea Road in Union County (the "Site"). The Site is designated as Tax Parcel ID No. 06201007J.

More specifically, Dormie proposes to develop a one-story, 12,000 square foot medical office building on the Site in accordance with the site plan and building elevations and renderings that were submitted with the Application for Conditional Rezoning.

Bjorn, thank you for your assistance on this matter. Please let me know if you have any questions or comments.

Sincerely,

ROBINSON, BRADSHAW & HINSON, P.A.



John H. Carmichael

**PROPOSED
REA ROAD
MEDICAL OFFICE
BUILDING**

9791 REA ROAD
WAXHAW, NC 28173
UNION COUNTY, NC

Revisions		
#	Date	Description
1	09.05.24	PLANNING COMMENTS
2	10.24.24	PLANNING COMMENTS

THE BOUNDARY INFORMATION DEPICTED ON THIS CONCEPTUAL TEST FIT SITE PLAN WAS PROVIDED BY OTHERS. RAGANA ARCHITECTURE & DESIGN, PLLC DID NOT CONFIRM THE ACCURACY OF THE BOUNDARY INFORMATION CONTAINED WITHIN. THE OWNER SHOULD OBTAIN A COMPLETE AND CURRENT SURVEY OF THE PROPERTY TO VERIFY THE VALIDITY OF THIS CONCEPTUAL TEST FIT SITE PLAN AS SHOWN

Project Number: 23149
Issued for: SITE PLANNING
Issue Date: 08/22/23

DRAWING TITLE
**ARCHITECTURAL
SITE PLAN**

SHEET NUMBER
AS101

BUILDING DATA	
BUILDING 1	12,000 SF
TOTAL	12,000 SF

PARKING DATA	
REQUIRED 1/300	40 SPACES
REQUESTED 5/1000	60 SPACES
PROVIDED	57 SPACES

BOUNDARY SURVEY DATA	
08-09-21	RB PHARR & ASSOCIATES, PA DRAWING 93222
08-09-21	RB PHARR & ASSOCIATES, PA DRAWING 95015A
08-09-21	RB PHARR & ASSOCIATES, PA DRAWING 95015B
09-13-19	BLOCK & CLARK CORP./ NV5 COMPANY

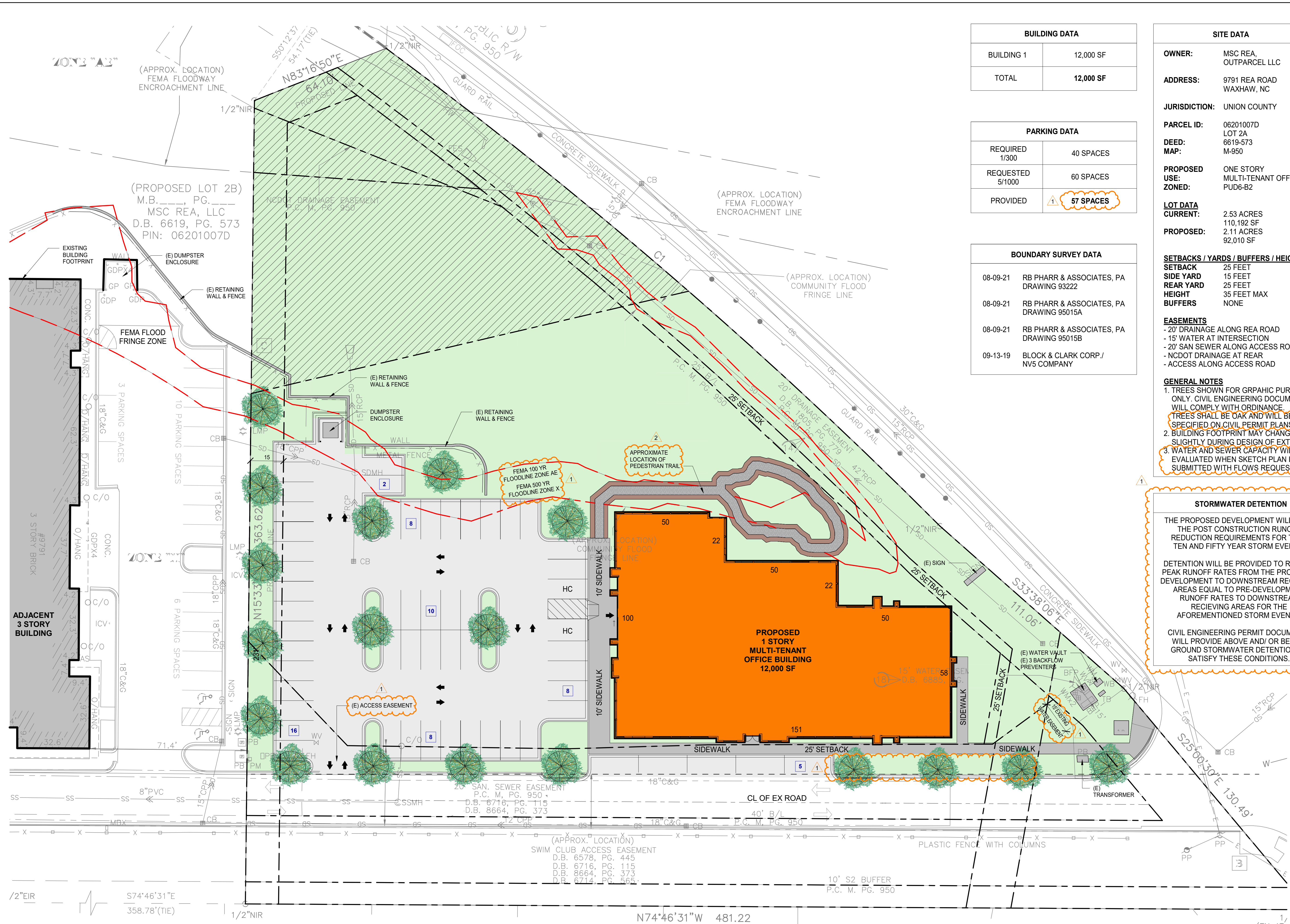
SITE DATA	
OWNER:	MSC REA, OUTPARCEL LLC
ADDRESS:	9791 REA ROAD WAXHAW, NC
JURISDICTION:	UNION COUNTY
PARCEL ID:	06201007D LOT 2A
DEED:	6619-573 M-950
PROPOSED USE:	ONE STORY MULTI-TENANT OFFICE
ZONED:	PUD6-B2
LOT DATA CURRENT:	2.53 ACRES 110,192 SF
PROPOSED:	2.11 ACRES 92,010 SF
SETBACKS / YARDS / BUFFERS / HEIGHT	
SETBACK	25 FEET
SIDE YARD	15 FEET
REAR YARD	25 FEET
HEIGHT	35 FEET MAX
BUFFERS	NONE
EASEMENTS	
	- 20' DRAINAGE ALONG REA ROAD
	- 15' WATER AT INTERSECTION
	- 20' SAN SEWER ALONG ACCESS ROAD
	- NCDOT DRAINAGE AT REAR
	- ACCESS ALONG ACCESS ROAD
GENERAL NOTES	
1.	TREES SHOWN FOR GRAPHIC PURPOSES ONLY. CIVIL ENGINEERING DOCUMENTS WILL COMPLY WITH ORDINANCE. TREES SHALL BE OAK AND WILL BE SPECIFIED ON CIVIL PERMIT PLANS.
2.	BUILDING FOOTPRINT MAY CHANGE SLIGHTLY DURING DESIGN OF EXTERIOR
3.	WATER AND SEWER CAPACITY WILL BE EVALUATED WHEN SKETCH PLAN IS SUBMITTED WITH FLOWS REQUESTED

STORMWATER DETENTION

THE PROPOSED DEVELOPMENT WILL MEET THE POST CONSTRUCTION RUNOFF REDUCTION REQUIREMENTS FOR TWO, TEN AND FIFTY YEAR STORM EVENTS.

DETENTION WILL BE PROVIDED TO REDUCE PEAK RUNOFF RATES FROM THE PROPOSED DEVELOPMENT TO DOWNSTREAM RECEIVING AREAS EQUAL TO PRE-DEVELOPMENT RUNOFF RATES TO DOWNSTREAM RECEIVING AREAS FOR THE AFOREMENTIONED STORM EVENTS.

CIVIL ENGINEERING PERMIT DOCUMENTS WILL PROVIDE ABOVE AND/OR BELOW GROUND STORMWATER DETENTION TO SATISFY THESE CONDITIONS.



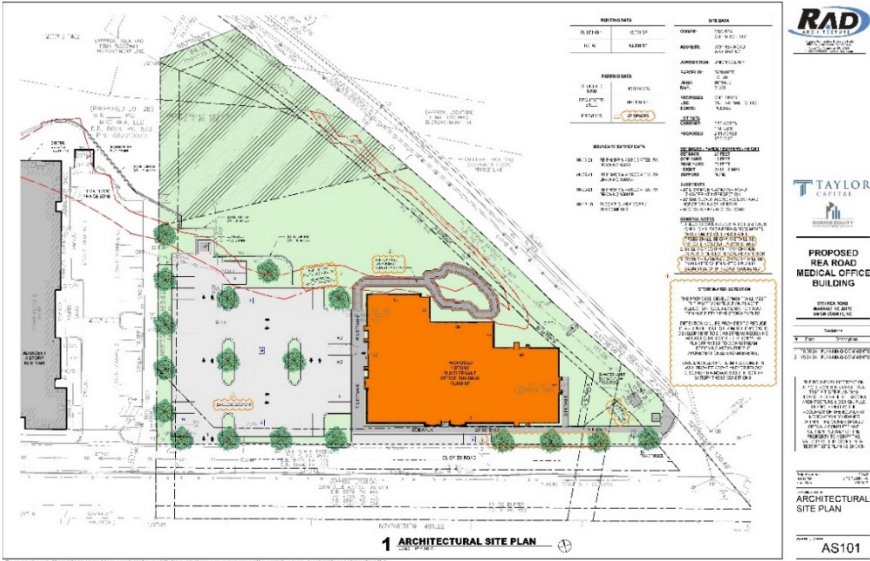
1 ARCHITECTURAL SITE PLAN
SCALE: 1" = 20'-0"

Planning Staff Report - Rezoning Case # CZ-2024-008
Staff Contact: Bjorn Hansen, Senior Planner

Summary of Request

This case is a rezoning request, petition CZ-2024-008, submitted by Dormie Equity Partners, LP (the “Applicant”) for revision of the Union County Zoning Map by amending the approved Planned Unit Development district permit with associated conditions for a 2.53 acre parcel of land appearing on the tax map as tax parcel 06-201-007J in the Sandy Ridge Township under an existing legacy PUD6-B2 zoning district. The rezoning will include the following conditions:

1. Pursuant to Section 160D-108.1 of the North Carolina General Statutes and Section 80.020 of the Union County Unified Development Ordinance, the approval is vested for a period of five years.
2. Development will meet all requirements of the Union County Unified Development Ordinance.
3. The approval is limited to the site plan dated October 24, 2024.
4. The permitted uses on the site include all office uses, including medical office.
5. The site may include natural-surface pedestrian trails within areas that fall within a floodplain.
6. The site may include pedestrian-related improvements and plantings (including in the floodplain) as allowed under the Union County Unified Development Ordinance and other state, local, and federal regulations.



Owner/Applicant

Owners: MSC Rea Outparcel, LLC
725 Park Cedar Drive
Matthews, NC 28105

Applicant: Dormie Equity Partners, LP
1213 West Morehead Street, Fifth Floor
Charlotte, NC 28208

Property Information

Location: On the southwest side of the intersection of Rea and Tom Short Roads. Location more specifically described as tax parcel 06-201-0071.



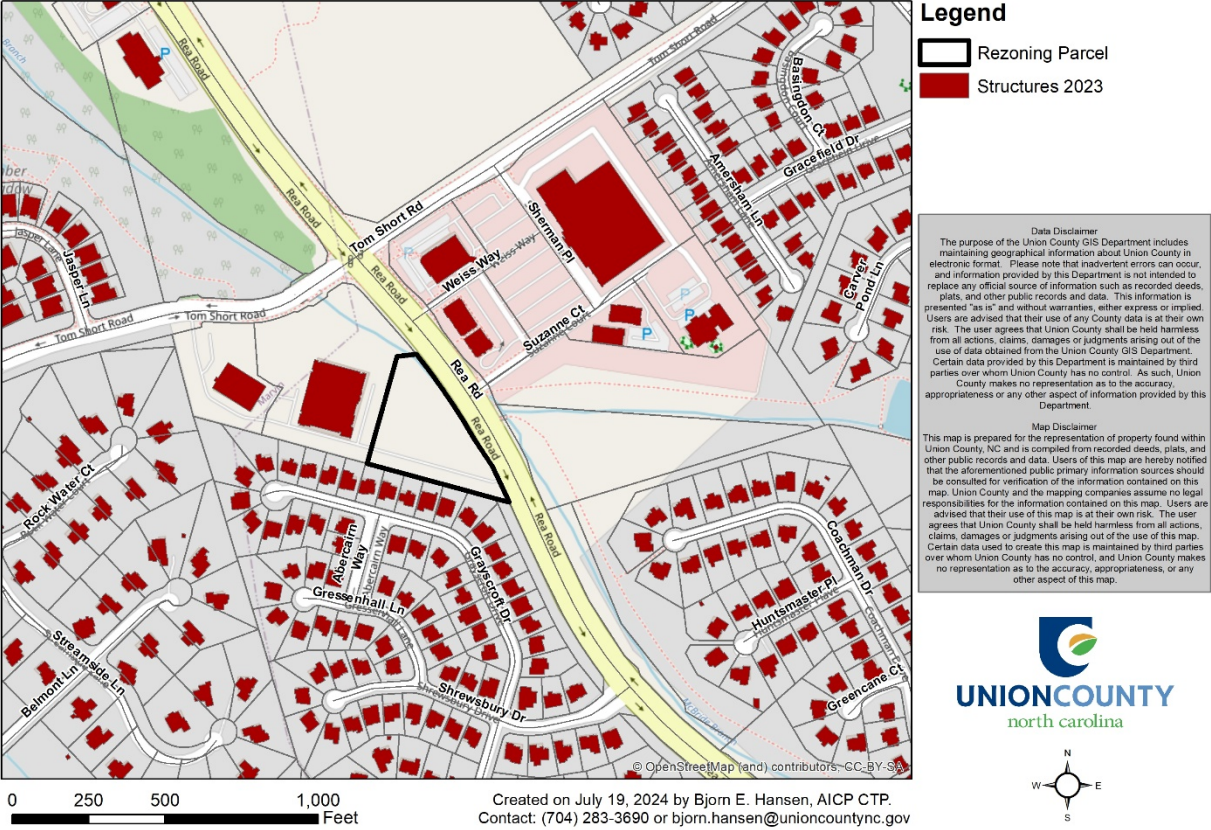
Municipal Proximity: The site is immediately east of the Village of Marvin.

Existing Land Use and Development Status: The parcel is currently zoned PUD6-B2 and is undeveloped.

Development Status

Petition: 2024-CZ-008
Name: Dormie

Size: 2.53 acres
Tax Parcel: 06-201-007J



Environmental Features: There is a floodplain on the northern edge of the site and detention would be required as part of the site plan.

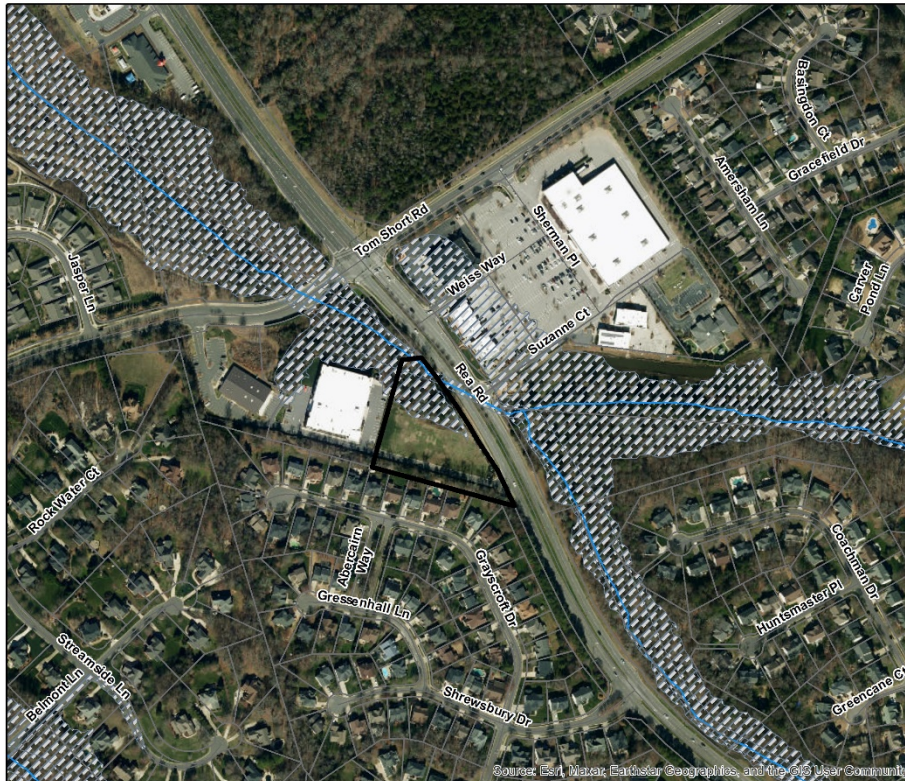
Environmental Features

Petition: 2024-CZ-008




Name: Dormie

Size: 2.53 acres

Tax Parcel: 06-201-007J



Legend

-  Rezoning Parcel
-  Streams
-  500 Year Flood Plain

Data Disclaimer
The purpose of the Union County GIS Department includes maintaining geographical information about Union County in electronic format. Please note that inadvertent errors can occur, and information provided by this Department is not intended to replace any official source of information such as recorded deeds, plats, and other public records and data. This information is presented "as is" and without warranties, either express or implied. Users are advised that their use of any County data is at their own risk. The user agrees that Union County shall be held harmless from all actions, claims, damages or judgments arising out of the use of data obtained from the Union County GIS Department. Certain data provided by this Department is maintained by third parties over whom Union County has no control. As such, Union County makes no representation as to the accuracy, appropriateness or any other aspect of information provided by this Department.

Map Disclaimer
This map is prepared for the representation of property found within Union County, NC and is compiled from recorded deeds, plats, and other public records and data. Users of this map are hereby notified that the aforementioned public primary information sources should be consulted for verification of the information contained on this map. Union County and the mapping companies assume no legal responsibilities for the information contained on this map. Users are advised that their use of this map is at their own risk. The user agrees that Union County shall be held harmless from all actions, claims, damages or judgments arising out of the use of this map. Certain data used to create this map is maintained by third parties over whom Union County has no control, and Union County makes no representation as to the accuracy, appropriateness, or any other aspect of this map.

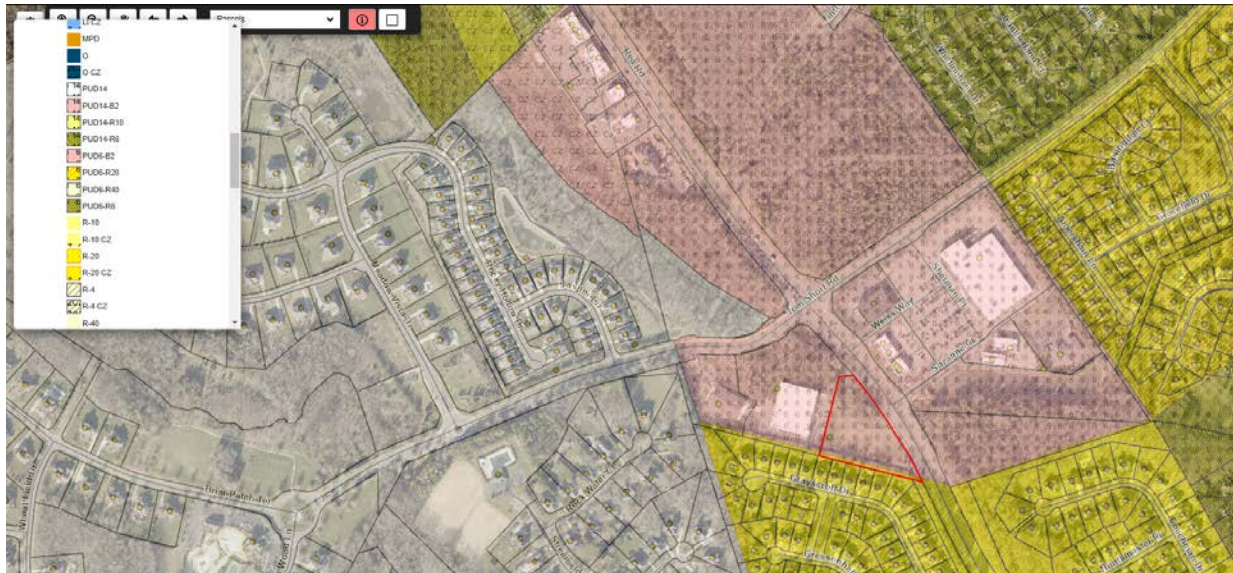


0 250 500 1,000
Feet

Created on July 19, 2024 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov

Utilities: Public water and sewer are available to the site.

Zoning and Land Use History: The site has been zoned as PUD6 since 2004, when it was rezoned as part of the overall site that now includes the Kohls, vacant land on the northeast corner of Tom Short and Rea Roads, and portions of Hunter Oaks. There were three unsuccessful and one successful rezoning from R-40 to R-20, which resulted in 246 acres of residential development in the immediate vicinity of the site. There also was an approved townhouse development on the county line north of this site approved in 2018. There have been two commercial rezonings proposed since 2018, including the approved shopping center north of the Lighthouse Child Care Facility and denied telecommunications tower behind Lighthouse. There have been five special use permits at this intersection, all relating to the implementing the PUD zoning of the overall development. All five were approved, and all have been implemented, with the exception of the large vacant parcel on the northeast corner of Rea and Tom Short.



Schools: Because this rezoning request is commercial in nature, UCPS was not consulted for comments.

Transportation: This site is off of Rea Road, which is a NCDOT-maintained facility. It has a 2022 daily traffic count of 22,000 vehicles per day. There are no funded road improvements in the vicinity of the project. This site is expected to generate approximately 400 trips per day, which did not meet Union County or NCDOT thresholds for a traffic impact analysis. No improvements to Rea Road are recommended as part of this rezoning or site plan. The site would use the existing driveway off of Rea Road.

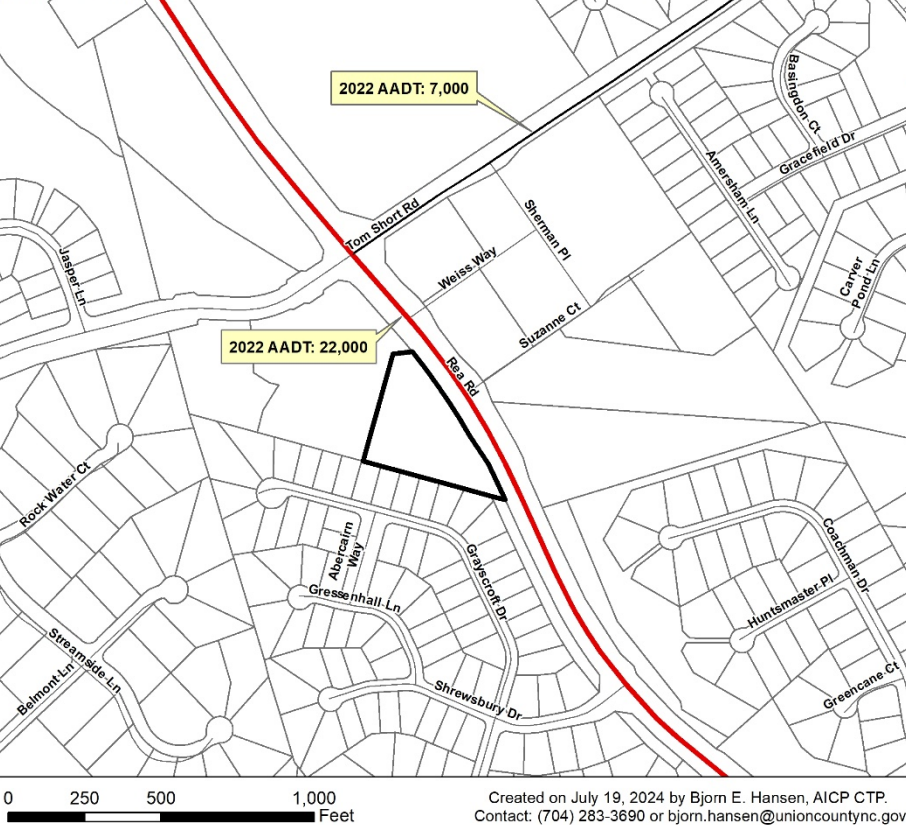
Transportation

Petition: 2024-CZ-008




Name: Dormie

Size: 2.53 acres

Tax Parcel: 06-201-007J



Legend

-  Rezoning Parcel
-  Existing, Boulevard
-  Existing, Minor Thoroughfare

Data Disclaimer
The purpose of the Union County GIS Department includes maintaining geographical information about Union County in electronic format. Please note that inadvertent errors can occur, and information provided by this Department is not intended to replace any official source of information such as recorded deeds, plats, and other public records and data. This information is presented "as is" and without warranties, either express or implied. Users are advised that their use of any County data is at their own risk. The user agrees that Union County shall be held harmless from all actions, claims, damages or judgments arising out of the use of data obtained from the Union County GIS Department. Certain data provided by this Department is maintained by third parties over whom Union County has no control. As such, Union County makes no representation as to the accuracy, appropriateness or any other aspect of information provided by this Department.

Map Disclaimer
This map is prepared for the representation of property found within Union County, NC and is compiled from recorded deeds, plats, and other public records and data. Users of this map are hereby notified that the aforementioned public primary information sources should be consulted for verification of the information contained on this map. Union County and the mapping companies assume no legal responsibilities for the information contained on this map. Users are advised that their use of this map is at their own risk. The user agrees that Union County shall be held harmless from all actions, claims, damages or judgments arising out of the use of this map. Certain data used to create this map is maintained by third parties over whom Union County has no control, and Union County makes no representation as to the accuracy, appropriateness, or any other aspect of this map.



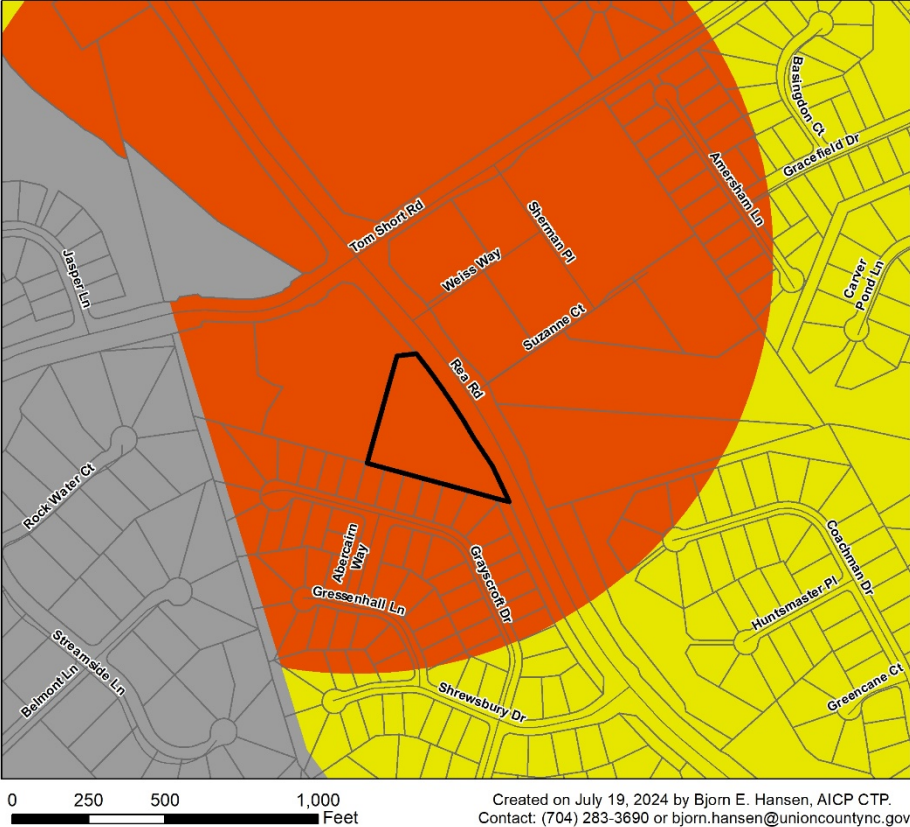
Planning Documents

Union County Comprehensive Plan: The Union County 2050 comprehensive plan identifies this area part of a small commercial center. A Small community center typically serves a larger population and includes 125,000 square feet to 400,000 of square feet of leasable space. The typical trade area of a Community Center is three to six miles. Small community centers should be anchored by a commercial use such as a grocery store or retailer. The surrounding land use is for single-family residential at a density of approximately two units per acre.





Land Use Map

Petition: 2024-CZ-008
Name: Dormie

Size: 2.53 acres
Tax Parcel: 06-201-007J



Legend

-  Rezoning Parcel
-  Municipalities
-  Community Center-Small
-  Single Family

Data Disclaimer
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UNIONCOUNTY
north carolina



Public and Municipal Comments

Public Comments: A community meeting was held October 8, 2024. Three residents attended the meeting and asked about the process for rezoning and parking requirements. No changes were made based on feedback. No additional comments have been received by staff.

Municipal Comments: Marvin is less than a quarter mile west of the site and was contacted for comments. They did not have any comments about the proposed rezoning.

Land Use Board Recommendation

The Land Use Board reviewed this proposal at its November 19, 2024, meeting and unanimously recommended approval of the proposed rezoning, citing consistency with the adopted plan and limited traffic impacts.

Staff Comments and Recommendation

This part of Union County is identified as a commercial node, as well as single-family residential land uses. This proposal for medical office uses is consistent with the PUD zoning for the site and the commercial node designation for the area. The proposal can meet Union County development standards and will have a low impact on adjacent roads. **Because of these aspects of the development, staff recommend approval of this rezoning application.**

ORDINANCE APPROVING REVISION TO THE OFFICIAL ZONING MAP OF UNION COUNTY, NORTH CAROLINA

WHEREAS, the Union County Board of County Commissioners (the “Board”) heretofore enacted the “Unified Development Ordinance of Union County, North Carolina,” including any amendments thereto (the “UDO”) and the official Union County Zoning Map (“Zoning Map”); and

WHEREAS, Union County has received a rezoning petition CZ-2024-008, submitted by Dormie Equity Partners, LP (the “Applicant”) for revision of the Union County Zoning Map by amending the approved Planned Unit Development district permit with associated conditions for a 2.53 acre parcel of land appearing on the tax map as tax parcel 06-201-007J in the Sandy Ridge Township under an existing legacy PUD6-B2 zoning district, and

WHEREAS, the Union County Land Use Board considered and made a recommendation concerning approval or denial of the Rezoning Petition; and

WHEREAS, the Board has determined that approval of the Rezoning Petition and rezoning of the parcel through amending the approved Planned Unit Development district permit with associated conditions is reasonable and in the public interest, including for those reasons set forth in the contemporaneously adopted consistency and reasonableness statement.

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

1. The Zoning Map is hereby amended by rezoning Parcel 06-201-007J through amendment of the approved Planned United Development district permit with associated conditions included in the existing legacy PUD6-B2 zoning district.
2. The conditions associated with amendment to the approved Planned Unti Development district permit are accepted by the Applicant and are hereby approved and incorporated into the PUD6-B2 zoning district and the Planned Unit Development District Permit.
3. This ordinance is effective upon adoption.

Adopted this ____ day of _____, 2024.

Chairman, Union County Board of Commissioners

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2024-008)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition CZ-2024-008, from Dormie Equity Partners, LP (the “Applicant”) for revision of the Union County Zoning Map by amending the approved Planned Unit Development district permit with associated conditions for a 2.53 acre parcel of land appearing on the tax map as tax parcel 06-201-007J in the Sandy Ridge Township under an existing legacy PUD6-B2 zoning district.

TO APPROVE THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion

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

TO DENY THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN)

Motion

(i) Deny rezoning petition CZ-2024-008 from Dormie Equity Partners, LP; and (ii) adopt the consistency and reasonableness statement for denial.

Statements of Consistency and Reasonableness for Proposed Amendment to the Union County Zoning Map

The Union County Land Use Board recommended that the Union County Board of Commissioners _____ the rezoning petition CZ-2024-008, from Dormie Equity Partners, LP (the “Applicant”) for revision of the Union County Zoning Map by amending the approved Planned Unit Development district permit with associated conditions for a 2.53 acre parcel of land appearing on the tax map as tax parcel 06-201-007J in the Sandy Ridge Township under an existing legacy PUD6-B2 zoning district.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2024-008)

Pursuant to N.C.G.S. § 160D-605, the Union County Board of Commissioners (the “Board”) does hereby find and determine that adoption of the proposed map amendment is consistent with the currently adopted Union County Comprehensive Plan (the “Plan”). The adoption of the proposed map amendment (i) takes into account the need to amend the zoning map to meet the needs of the community, and (ii) is reasonable and in the public interest because:

1. The proposed use of a one-story multi-tenant office building is consistent with the Land Use Map (the “Map”) adopted as part of the Plan, as the Map identifies the area within which the subject property is located as a “Small Community Center.” Small Community Centers are shown in the Plan as areas at key intersections identified for commercial development. A multi-tenant office building is consistent with the commercial development identified by the Plan.
2. The proposed use is in an urbanized part of Union County, shortening trip lengths for residents utilizing the office services associated with the property.
3. The proposed use will share a driveway with an existing commercial use, reducing its impact on traffic congestion and the adjacent road.

**CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE
PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE
CURRENT PLAN) (CZ-2024-008)**

Pursuant to N.C.G.S. § 160D-605, the Union County Board of Commissioners (the “Board”) does hereby find and determine that this rezoning petition is consistent with the Union County Comprehensive Plan (the “Plan”); however, denial of the proposed map amendment is reasonable and in the public interest because:

1. The proposed use would increase impervious area immediately adjacent to a floodplain, increasing the potential for flooding in the area.
2. Additional commercial use allowed in the area could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is noted as a concern in the Plan.



Union County, NC

Staff Report

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

File #: 24-862

Agenda Date: 12/16/2024

TITLE:

Proclamation for Cervical Cancer Awareness Month (January 2025)

INFORMATION CONTACT:

Brian Matthews, County Manager, 704-292-2597

ACTION REQUESTED:

Adopt Proclamation proclaiming January 2025 to be Cervical Cancer Awareness Month in Union County.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

National Cervical Cancer Awareness Month was first recognized in 2002 and is observed every January. The U.S. Congress first introduced it in 1999 as a House Concurrent Resolution. Cervical Cancer Awareness Month is an annual observance held throughout the Month of January. It is intended to raise awareness of cervical cancer and to promote research into its cause, prevention, diagnosis, treatment, survivorship and cure.

FINANCIAL IMPACT:

None.

PROCLAMATION BY THE UNION COUNTY BOARD OF COMMISSIONERS
CERVICAL CANCER AWARENESS MONTH 2025

WHEREAS, in North Carolina, in 2024, more than 350 women will be diagnosed with invasive cervical cancer and over 100 women will die of cervical cancer according to estimates from the North Carolina Department of Health and Human Services; and

WHEREAS, the National Cancer Institute that the five-year survival rate of individuals diagnosed with cervical cancer is 67.4 percent, due to improved treatment, early diagnosis and vaccinations; and

WHEREAS, cervical cancer incidence rates and death rates are still high among certain populations in the United States, according to NIH, largely due to limited access to cervical cancer screening and vaccinations; and

WHEREAS, the Union County Public Health Breast and Cervical Cancer Control Program provides free breast and cervical cancer screening and follow-up services for women who meet the financial qualifications set by the state of North Carolina: and

WHEREAS, the Union County Board of Commissioners recognizes cervical cancer awareness and encourages all residents to recognize that cervical cancer is treatable, and that routine screening and HPV vaccinations can save lives

WHEREAS, the results from a simple Pap test and HPV co-test can be used to help prevent cervical cancer or detect cervical cancer in its earliest and most curable stage

WHEREAS, patient advocacy organizations like Cervivor, who inspire and empower those affected by cervical cancer by educating and motivating them to use their voices for creating awareness to end stigma, influence decision and change, and end cervical cancer.

NOW, THEREFORE, BE IT PROCLAIMED by the Union County Board of Commissioners that January 2025 shall be known as “Cervical Cancer Awareness Month” in Union County, North Carolina.

Adopted the 16th day of December 2024.

ATTEST:

Lynn G. West, Clerk to the Board

Melissa Merrell, Chair
Union County Board of Commissioners



Union County, NC

Staff Report

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

File #: 24-843

Agenda Date: 12/16/2024

TITLE:

Service Award Recognition

INFORMATION CONTACT:

Julie Broome, Human Resources Director, 704.283.3869

ACTION REQUESTED:

A short video will play to recognize employee service award recipients for the fourth quarter (October, November, and December).

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The employee recognition program acknowledges employees for full-time continuous service at the following intervals: 5 years, 10 years, 15 years, 20 years, 25 years, and 30 years of service. We would like to recognize our fourth quarter recipients for their service to Union County Local Government.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 24-793

Agenda Date: 12/16/2024

TITLE:

Deed Transfer - Union County Public Schools

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approved deed transfers to Union County Public Schools as construction has been completed.

PRIOR BOARD ACTIONS:

None

BACKGROUND:

When Union County Public Schools conducts major capital projects, they transfer the deed to Union County. The reason for this is that Union County is able to benefit from state sales tax reimbursement, and UCPS is not. At the end of the capital projects, the land is then deeded back to UCPS. This deed transfer will deed the following properties back to UCPS: Tax Parcel Nos. Monroe High School (09194029), Porter Ridge Middle School (08267003), Porter Ridge High School (08267003), Sun Valley High School (07072002), Western Union Elementary School (05033053), Piedmont High School (08129031), Transportation Facility (09372003F)

FINANCIAL IMPACT:

None.

Excise Tax **\$0.00**

Recording Time, Book and Page

Tax Parcel Nos. Monroe High School (09194029), Porter Ridge Middle School (08267003), Porter Ridge High School (08267003), Sun Valley High School (07072002), Western Union Elementary School (05033053), Piedmont High School (08129031), Transportation Facility (09372003F)

Verified by _____ County on the ____ day of _____ 2024
by

Mail after recording to: **Grantee**
This instrument was prepared by

Brief Description for the index

Monroe High School, Porter Ridge High School, Porter Ridge Middle School, Sun Valley High School, Western Union Elementary School, Piedmont High School, Transportation Facility

NORTH CAROLINA SPECIAL WARRANTY DEED

THIS DEED made this _____ day of _____ 2024 by and between

GRANTOR

Union County
500 North Main Street, Room 925
Monroe, NC 28112

GRANTEE

Union County Board of Education
C/O Director of Facilities
400 N. Church St.
Monroe, NC 28112

Enter in appropriate block for each party: name, address, and, if appropriate, character of entity, e.g., corporation or partnership.

The designation Grantor and Grantee as used herein shall include said parties, their heirs, successors, and assigns, and shall include singular, plural, masculine, a feminine or neuter as required by context.

WITNESSETH, that the Grantor, for a valuable consideration paid by the Grantee, the receipt of which is hereby acknowledged, has and by these presents does grant, bargain, sell and convey unto the Grantee in fee simple, all that certain lot or lots or or parcels of land situated in Union County, North Carolina and more particularly described as follows:

See Exhibit A attached hereto and incorporated herein by reference.

The property hereinabove described was acquired by Grantor by instrument recorded in **Book 7287, Page 799 in the Union County Register of Deeds Office.**

A map showing the above described property is recorded in **N/A.**

The property conveyed herein does not include the primary residence of Grantor.

TO HAVE AND TO HOLD the aforesaid lot or parcel of land and all privileges and appurtenances thereto belonging to the Grantee in fee simple.

And the Grantor covenants with the Grantee, that Grantor is seized of the premises in fee simple, has the right to convey the same in fee simple. Grantor covenants with the Grantee that Grantor has done nothing to impair such title as Grantor received, and Grantor will warrant and defend the title against the lawful claims of all persons claiming, by under or through Grantor, except for the exceptions hereinafter stated. Title to the property hereinabove described is subject to the following exceptions:

- Real estate taxes for 2024 and subsequent years.
- All other valid and enforceable easements and restrictions of record.
- Matters that would be disclosed by a current and accurate survey of the property.
- Mechanic’s or materialman’s liens (whether recorded or unrecorded).
- The Interlocal Agreement between Grantor and Grantee dated January 16, 1996, as subsequently amended and restated.

IN WITNESS WHEREOF, the Grantor has hereunto set his hand and seal, or if corporate, has caused this instrument to be signed in its corporate name by its duly authorized officers and its seal to be hereunto affixed by authority of its Board, the day and year first above written.

Union County (SEAL)

By: _____ (SEAL)
Its: _____

NORTH CAROLINA, UNION COUNTY

Seal-Stamp

NORTH CAROLINA, _____ County.

**I, _____, _____ (Official title of officer taking acknowledgment),
certify that _____ personally came before me this day and
acknowledged that he (or she) is _____ (Title of official) of Union
County, and that he/she, as _____ (Title of official), being
authorized to do so, executed the foregoing on behalf of the Union County.**

Use Black Ink

**Witness my hand and official stamp or seal, this ____ day of _____,
_____.**

**(Signature of officer taking acknowledgment)
(Official seal, if officer taking acknowledgment has one.)**

My Commission expires: _____ Notary Public

EXHIBIT A

The following properties located in Union County:

Site	Address	ID#	Approximate Acreage
Monroe High School	1 High School Drive Monroe, NC 28112	09194029	29.02
Porter Ridge Middle School	2839 Ridge Road Indian Trail, NC 28079	08267003	179.83
Porter Ridge High School	2827 Ridge Road Indian Trail, NC 28079		
Sun Valley High School	5211 Old Charlotte Highway Monroe, NC 28110	07072002	30.00
Western Union Elementary School	4111 Western Union School Rd Waxhaw, NC 28173	05033053	30.00
Piedmont High School	3006 Sikes Mill Road Monroe, NC 28110	08129031	38.67
Transportation Facility	Goldmine Road Monroe, NC 28110	09372003F	35.69



Union County, NC

Staff Report

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

File #: 24-845

Agenda Date: 12/16/2024

TITLE:

Contract Renewal - Custom Mobile App

INFORMATION CONTACT:

Dorothy Thomas, Union County Sheriff's Office, Public Safety Finance Administrator, 704-283-3578

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Sheriff's Office (UCSO) smartphone application has proven to be an invaluable tool in our agency's commitment to enhancing public safety and keeping the community informed. With over 22,000 dedicated users, the app plays a critical role in our communication strategy, allowing us to disseminate essential information quickly and effectively to a broad audience. Our current reach extends to an average of 150,000-250,000 individuals weekly, enabling the UCSO to connect with our community on an unprecedented scale and ensuring that urgent updates and resources are accessible to all residents. The UCSO app facilitates a wide range of services and provides essential information in one easy-to-navigate platform. App users can access real-time traffic updates, locate registered sex offenders, find inmate information, browse adoptable animals, and access rehabilitation and domestic violence resources. Additionally, the app provides timely news releases, emergency notifications, and employment opportunities within the Sheriff's Office, offering a comprehensive suite of services that meet the diverse needs of our residents. Our app is continuously updated and refined based on user feedback, and we have received overwhelmingly positive responses from the community. This adaptability ensures that the app remains relevant, responsive, and highly effective as a tool for public engagement and safety. Maintaining funding for the UCSO mobile application is essential to uphold the level of service that Union County residents have come to expect. Continued support will enable us to expand features, improve user experience, and further strengthen our communication with the community. By investing in this proven resource, the UCSO can continue to provide an accessible and effective platform that enhances public safety, empowers residents, and builds trust in law enforcement. The Sheriff's Office will collaborate with Procurement to explore solicitation options near the end of the renewal term.

The Union County Sheriff's Office has utilized the contractual services of OCV, LLC for Sheriff

Smartphone Application since 2023. OCV, LLC has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional three years.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$15,782. Since this contract contains a three-year term, a total of \$47,346 is estimated to be spent. Funding is available in the adopted FY2025 budget with future expenditures subject to annual BOCC budget appropriation.

COUNTY OF UNION

This Amendment, made and entered into as of _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina, acting through the Union County Sheriff's Office, hereinafter referred to as "Client," and OCV, LLC, hereinafter referred to as "Host," shall modify as indicated that agreement between the parties effective November 1, 2022, as modified by Amendment dated November 16, 2023, hereinafter referred to as the "Agreement."

WITNESSETH:

WHEREAS, Host and Client entered into an agreement pursuant to which Host would provide Client with custom mobile app development services and support; and

WHEREAS, Client now desires to extend the term of the Agreement for three (3) years; and

WHEREAS, Host is willing to continue to provide the services during the extended term.

NOW, THEREFORE, in consideration of the parties' continuing obligations under the Agreement and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto do each contract and agree with the other as follows:

1. The parties agree to extend the term of the Agreement for three (3) years, beginning November 1, 2024, and ending October 31, 2027 (the "Extended Term").

2. During the Extended Term, Union agrees to pay Host an amount not to exceed Fifteen Thousand Seven Hundred Eight-Two Dollars (\$15,782.00) per year, in accordance with the attached Exhibit A, which is incorporated herein by reference.

3. Except as herein amended, the terms and provisions of the Agreement shall remain in full force and effect.

4. Each signatory below warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Amendment. Each signatory further warrants that the execution, delivery and performance by it of this Amendment and the Agreement has been duly authorized and approved by all requisite action of the party's management and appropriate governing body.

IN WITNESS WHEREOF, the parties hereto, acting under authority of their respective governing bodies, have hereunto set their hands and seals and caused this Amendment to be duly executed, this the day and year first above written.

UNION COUNTY

OCV, LLC

By: _____ (SEAL)
Brian W. Matthews, County Manager

By: _____ (SEAL)

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



Union County Sheriff’s Office, NC Support

Service	Total
Annual Subscription / Maintenance Fee (500k - 1 Million Population) Support Includes: Full Technical Support iOS & Android App Updates Content Updates Addition of (Control Panel Content - Pages, Weblink, Basic Forms at no additional expense)	
JMS / Inmate Search Annual Maintenance	
CAD / Traffic Feed Annual Maintenance	
Sex Offender Search Annual Maintenance	
Total Support Post Discount (November 2024 - November 2027) October	\$15,782 Per Year

INT _____



Union County, NC

Staff Report

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

File #: 24-861

Agenda Date: 12/16/2024

TITLE:

Purchase - Body Armor from Lawmen's Distribution, LLC

INFORMATION CONTACT:

Dorothy Thomas, Sheriff's Office, Public Safety Finance Administrator, 704-283-3578

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Sheriff's Office would like to purchase Safariland body armor from Lawmen's Distribution, LLC. The body armor purchase replaces old worn existing body armor and new hires. Purchasing from Lawmen's Distribution, LLC ensures body armor conformity throughout the agency. N.C.G.S 143-129(e)(3) and N.C.G.S 143-129(e)(9) allow local governments to make purchases through a competitively bid North Carolina Statewide Term Contract or a Group Purchasing Program. The purchase of the Body Armor will be made using North Carolina Statewide Term Contract 680C quoted by Lawmen's Distribution, LLC.

FINANCIAL IMPACT:

The anticipated cost for the Body Armor is \$99,524.95 and is budgeted accordingly for FY 2025.



3319 Anvil Place
Raleigh, NC 27603

800 Clanton Road Suite T
Charlotte, NC 28217

SALES QUOTE

SQ-407405

9/10/2024



REMIT TO: 3319 Anvil Place, Raleigh, NC 27603

Customer	Contact	Ship To
(NC) UNION CO. SHERIFFS OFFICE ATTN: ACCOUNTS PAYABLE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)283-3612, (704)283-3789 Fax: (704)283-3614		UNION CO. SHERIFFS OFFICE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)292-2685

Account	Terms	Due Date	Account Rep	Schedule Date
UNION	NET 30 Email Delivery	10/10/2024	Zachary Parke	9/10/2024

Quotation	PO #	Reference	Ship VIA	Page	Printed
SQ-407405		MULTI	FACTORY DIRECT	1	10/11/2024 1:34:12PM

I	Item	Description	Qty	Price	UM	Discount	Amount
1		STATE CONTRACT 680C					
2		PATROL - REGULAR					
3	SBA1350430U	Safariland 1350430-U Hardwire 68 Level IIIA A5 - Female Unstructured Panel Set QN: 23-QUO-005309 STATE OF NC NIEVES, PILAR U2213-2212 ROBILLARD, KAITLIN U2414-2416 DRAKE, CHRISTINA U2211-2212 GAUGHRAN, KATIE U2812-2612 LEE, CHASITY U2411-2212 DOBBINS, BRITTANY U2612-2612	6	\$959	EA		\$5,754.00
4	SBA1350430M	Safariland Armor 1350430-M Hardwire 68 Level 3A A7 - Male Panel Set CASTROGIOVANNI, CHRIS 2212-2214 KAZIMIERA, ZAPADKA 2813-2615 HUNT, JACKSON 2415-2417 EUBANKS, CALEB 3216-3217 CARTER, JOHNATHAN 2814-2616 MULLIS, ANDREW 3016-2818 PRICE, MATT 2817-2818 LHEUREUX, LOREN 2814-2815 CUNNINGHAM, TODD 2414-2216 MORELLI, VINCENT 2212-2213 ENZOR, MICHAEL 2816-2617 LORENZ, MCKENSIE 2414-2415 PRESSLEY, JERAMY 2413-2415 JOHNSON, YANCY 2416-2416 MONTGOMERY, MASON 2413-2215 HARLOW, JOSH 2415-2417 KEELAN, WILLIAM 2615-2418	61	\$959	EA		\$58,499.00

Pricing is valid for 30 days. * Please verify that the part numbers and descriptions are correct before submitting your order. * Restocking fees may apply to returned items. Firearms, ammunition, special order or customized items and certain other products may not be returned. * Many products sold have manufacturer's warranties. For returns related to matters covered by a manufacturer's warranty, please contact the manufacturer directly for instructions to repair or replace your product. We do not augment or supplement the manufacturer warranty. * Prices on this quotation assume payment with cash or check.

Page	1
Sub Total	\$64,253.00



3319 Anvil Place
Raleigh, NC 27603

800 Clanton Road Suite T
Charlotte, NC 28217

SALES QUOTE	
SQ-407405	9/10/2024



REMIT TO: 3319 Anvil Place, Raleigh, NC 27603

Customer	Contact	Ship To
(NC) UNION CO. SHERIFFS OFFICE ATTN: ACCOUNTS PAYABLE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)283-3612, (704)283-3789 Fax: (704)283-3614		UNION CO. SHERIFFS OFFICE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)292-2685

Account	Terms	Due Date	Account Rep	Schedule Date
UNION	NET 30 Email Delivery	10/10/2024	Zachary Parke	9/10/2024

Quotation	PO #	Reference	Ship VIA	Page	Printed
SQ-407405		MULTI	FACTORY DIRECT	2	10/11/2024 1:34:12PM

I Item	Description	Qty	Price	UM	Discount	Amount
	SELF, JUSTIN 2615-2417 WILLIS, THEODORE 2416-2417 WALDEN, WILLIAM 2615-2416 HARGETTE, ANDREW 2814-2816 MACARINE, BRIAN 2415-2417 CLAWSON, TYLER 2815-2818 RUTLEDGE, JODY 2618-2618 EVANS, CHAD 2414-2215 INGRAM, JONATHAN 2814-2817 QURESHI, OMAR 2414-2416 PRESLAR, MITCH 2413-2415 CHILDS, CHRISTOPHER 2615-2416 PRESSON, JONATHAN 2615-2517 FURR, JESSE 2213-2214 KEZIAH, JUSTIN 2212-2014 BEACH, DYLAN 2013-2015 MARTIN, TIMOTHY 2817-2618 BUSEY, CHRISTOPHER 2815-2617 GREEN, MAXWELL 2214-2215 EASON, STEPHEN 2615-2417 ANDERSON, GARRETT 3016-2816 FINCHER, PHILIP 2414-2416 MOORE, ALEX 2414-2417 BLAKELY, LARON 2814-2615 HELMS, MIKE 2413-2415 TYSON, WES 2414-2416 SAILER, JOSEPH 3216-3018 EVERETTE, MICHAEL 2011-2013 KAY, AMY U2614-2614 SIMS, TAYLOR 2615-2418 BELK, BRAD 2414-2515 BLYTHE, DYLAN 3417-3218 GRIFFIN, BRIAN 2615-2616 RUMLEY, JASON 2614-2415					

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Page	2
Sub Total	\$0.00
Running Sub Total	\$64,253.00



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SALES QUOTE	
SQ-407405	9/10/2024

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(NC) UNION CO. SHERIFFS OFFICE ATTN: ACCOUNTS PAYABLE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)283-3612, (704)283-3789 Fax: (704)283-3614		UNION CO. SHERIFFS OFFICE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)292-2685

Account	Terms	Due Date	Account Rep	Schedule Date
UNION	NET 30 Email Delivery	10/10/2024	Zachary Parke	9/10/2024

Quotation	PO #	Reference	Ship VIA	Page	Printed
SQ-407405		MULTI	FACTORY DIRECT	3	10/11/2024 1:34:12PM

Quotation	PO #	Reference	Ship VIA	Page	Printed
SQ-407405		MULTI	FACTORY DIRECT	3	10/11/2024 1:34:12PM

I	Item	Description	Qty	Price	UM	Discount	Amount
		KNOX, ASHLEY 2213-2215 (male panels) MILES, JOHN 2815-2615 BIGHAM, STEVEN 2013-2013 CABOT, KARA 1812-1813 CIUCEVICH, FRANCIS 2413-2415 MORRIS, DARRELL 2615-2617 HILL, TREVOR 2614-2617 MARBAN-FIGUEROA, OMAR 2413-2415 WEATHERMAN, JEFF 2616-2617 PURSER, BRADLEY 2212-2213					
5	SBA1348925BK	Safariland Armor 1348925 M Series Concealable Carrier Black	67	\$89	EA		\$5,963.00
6	SBA1363933T9	1363933-6840 External TMW Front Openting Carrier Tan 499. Specify ID Attachment Loop or Grommets; Specify Badge Shape Square, Oval, Standard or N/A.	67	\$230	EA		\$15,410.00
7	SBA122090258	Safariland 1220902-58 Soft Trauma Plate 5" X 8"	67	\$25	EA		\$1,675.00
8	SBATP21AT9	Safariland 1219671-TP21A Radio Pouch With Bungee Universal - Tan 499	67	\$39	EA		\$2,613.00
9	SBATP10AT9	Safariland 1219671-TP10A TP10A Side Arm Magazine Pouch Double Color - Tan 499	67	\$30.50	EA		\$2,043.50
10	SBATP13T9	Safariland 1219671-TP13 TP13 MK3 - MK4 Aerosol Pouch Color - Tan 499	67	\$30.50	EA		\$2,043.50
11	SBATP17AT9	Safariland 1219671-TP17A TP17A Handcuff Pouch Double Color - Tan 499	67	\$30.50	EA		\$2,043.50
12							
13		K-9					
14	SBA1363933TG	1363933-6840 External TMW Front Openting Carrier Tactical Green. Specify ID Attachment Loop or Grommets; Specify Badge Shape Square, Oval, Standard or	5	\$230	EA		\$1,150.00

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Page	3
Sub Total	\$32,941.50
Running Sub Total	\$97,194.50



3319 Anvil Place
Raleigh, NC 27603

800 Clanton Road Suite T
Charlotte, NC 28217

SALES QUOTE	
SQ-407405	9/10/2024



REMIT TO: 3319 Anvil Place, Raleigh, NC 27603

Customer	Contact	Ship To
(NC) UNION CO. SHERIFFS OFFICE ATTN: ACCOUNTS PAYABLE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)283-3612, (704)283-3789 Fax: (704)283-3614		UNION CO. SHERIFFS OFFICE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)292-2685

Account	Terms	Due Date	Account Rep	Schedule Date
UNION	NET 30 Email Delivery	10/10/2024	Zachary Parke	9/10/2024

Quotation	PO #	Reference	Ship VIA	Page	Printed
SQ-407405		MULTI	FACTORY DIRECT	4	10/11/2024 1:34:12PM

I	Item	Description	Qty	Price	UM	Discount	Amount
		N/A.					
		HARLOW, JOSH 2415-2417 PRESLAR, MITCH 2413-2415 ROBILLARD, KAITLIN U2414-2416 PRESSON, JONATHAN 2615-2517 BELK, BRAD 2414-2515					
15	SBATP21ATG	Safariland 1219671-TP21A TP21A Radio Pouch With Bungee Universal Color - Tactical Green	5	\$39	EA		\$195.00
16	SBATP10ATG	Safariland 1219671-TP10A TP10A Side Arm Magazine Pouch Double Color - Tactical Green	5	\$30.5	EA		\$152.50
17	SBATP13TG	Safariland 1219671-TP13 TP13 MK3 - MK4 Aerosol Pouch Color - Tactical Green	5	\$30.5	EA		\$152.50
18	SBATP17TG	Safariland 1219671-TP17 TP17 Handcuff Pouch Single Color - Tactical Green	5	\$30.5	EA		\$152.50
19	1223589SL84TGBK	SAFARILAND ID Patch - Large 8 x 4 SHERIFF Tactical Green Patch Black Letters	5	\$9	EA		\$45.00
20	1223589SSTGBK	SAFARILAND ID Patch - Small 5 x 2 SHERIFF Tactical Green Patch Black Letters	5	\$9	EA		\$45.00
21	1223589BLTG	SAFARILAND ID Patch - Large 8.5 x 3 BLANK Tactical Green Patch	5	\$9	EA		\$45.00

CUT DOWN TO NAMETAPE SIZE

FONT COLOR: BLACK
FONT STYLE: FRANKLIN GOTHIC MEDIUM
BACKING TYPE: VELCRO - HOOK
EMBROIDERY
LENGTH: UU'S STANDARD 5.5" X 1.25"

Pricing is valid for 30 days. * Please verify that the part numbers and descriptions are correct before submitting your order. * Restocking fees may apply to returned items. Firearms, ammunition, special order or customized items and certain other products may not be returned. * Many products sold have manufacturer's warranties. For returns related to matters covered by a manufacturer's warranty, please contact the manufacturer directly for instructions to repair or replace your product. We do not augment or supplement the manufacturer warranty. * Prices on this quotation assume payment with cash or check.

Page	4
Sub Total	\$787.50
Running Sub Total	\$97,982.00



3319 Anvil Place
Raleigh, NC 27603

800 Clanton Road Suite T
Charlotte, NC 28217

SALES QUOTE

SQ-407405

9/10/2024



REMIT TO: 3319 Anvil Place, Raleigh, NC 27603

Customer	Contact	Ship To
(NC) UNION CO. SHERIFFS OFFICE ATTN: ACCOUNTS PAYABLE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)283-3612, (704)283-3789 Fax: (704)283-3614		UNION CO. SHERIFFS OFFICE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)292-2685

Account	Terms	Due Date	Account Rep	Schedule Date
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UNION

NET 30 Email Delivery

10/10/2024

Zachary Parke

9/10/2024

Quotation	PO #	Reference	Ship VIA	Page	Printed
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SQ-407405

MULTI

FACTORY DIRECT

5

10/11/2024
1:34:12PM

I	Item	Description	Qty	Price	UM	Discount	Amount
22		NAME TAPE MATERIAL: STOCK NAME TAPE WORDING: J. HARLOW M. PRESLAR K. ROBILLARD J. PRESSON B. BELK					
23		CSI					
24	SBA1350430M	Safariland Armor 1350430-M Hardwire 68 Level 3A A7 - Male Panel Set	1	\$959	EA		\$959.00
25	SBA1363933BK	WEISS, CORY 2213-2015 1363933-DN6840 External TMW Front Opening Carrier Black. Specify ID Attachment Loop or Grommets; Specify Badge Shape Square, Oval, Standard or N/A.	1	\$230	EA		\$230.00
26	SBATP21BK	Safariland 1219671-TP21 TP21 Radio Pouch Universal Color - Black	1	\$30.5	EA		\$30.50
27	SBATP19BK	Safariland 1219671-TP19 TP19 Utility Pouch 8" X 8" Color - Black	1	\$30.5	EA		\$30.50
28	PRMJM218BKLG	PREMIER 3x8.5 Velcro ID BLACK TWILL LARGE HEAT PRESS ON: ID PATCH HEAT PRESS COLOR: SILVER HEAT PRESS LOCATION: CENTERED DESCRIPTION OF WHAT IS BEING HEAT PRESSED: CSI	1	\$9.00	EA		\$9.00
29	NAMETAPE	NAME TAPE COLOR: BLACK FONT COLOR: SILVER FONT STYLE: FRANKLIN GOTHIC MEDIUM	1	\$9.00	EA		\$9.00

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Page 5

Sub Total \$1,268.00

Running Sub Total \$99,250.00



3319 Anvil Place
Raleigh, NC 27603

800 Clanton Road Suite T
Charlotte, NC 28217

SALES QUOTE

SQ-407405

9/10/2024



REMIT TO: 3319 Anvil Place, Raleigh, NC 27603

Customer	Contact	Ship To
(NC) UNION CO. SHERIFFS OFFICE ATTN: ACCOUNTS PAYABLE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)283-3612, (704)283-3789 Fax: (704)283-3614		UNION CO. SHERIFFS OFFICE 3370 PRESSON ROAD MONROE NC 28112 Tel: (704)292-2685

Account	Terms	Due Date	Account Rep	Schedule Date
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UNION	NET 30 Email Delivery	10/10/2024	Zachary Parke	9/10/2024
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Quotation	PO #	Reference	Ship VIA	Page	Printed
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SQ-407405		MULTI	FACTORY DIRECT	6	10/11/2024 1:34:12PM
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I	Item	Description	Qty	Price	UM	Discount	Amount
30	SH	BACKING TYPE: VELCRO - HOOK HEAT PRESS LENGTH: UU'S STANDARD 5.5" X 1.25" NAME TAPE MATERIAL: STOCK NAME TAPE WORDING: C. WEISS SHIPPING/HANDLING	1	\$274.95	EA		\$274.95

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Tax Details
NCCTY675 \$6717.934

Taxable	\$99,524.95
Total Tax	\$6,717.93
Exempt	\$0.00
Total	\$106,242.88
Balance	\$106,242.88



Union County, NC

Staff Report

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

File #: 24-834

Agenda Date: 12/16/2024

TITLE:

NC Department of Public Safety - Juvenile Crime Prevention Council Funding FY 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Approve revised County Funding Allocation Plan FY 2024-2025, 2) authorize the Finance Director to approve the funding plan, grant agreements and documents related to such grant agreements during their terms, and 3) approve Budget Amendment 16.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

Funding for JCPC programs is generally adopted in the State Budget and assigned to County programs by a formula grant. Normally, a county JCPC approves a budget for the upcoming fiscal year, which is then submitted to the North Carolina Department of Public Safety Juvenile Justice and Delinquency Prevention (the DJJ). The attached funding plan was developed and approved by the JCPC Board and represents the Board's plan for how the funds will be spent for the 2024-2025 fiscal year. This request will be included in the State's DJJ budget which is being planned for 2024-2025.

The JCPC Board approved \$476,439 for County programs for the 2024-2025 fiscal year. The Revised Funding Plan allocates funding from the State to the following programs: Life Connections D -A-S-H Counseling Services \$146,593, Transforming Youth Movement Get Hired-Youth Employability \$40,000, Transforming Youth Movement SHIFT Restitution/CS \$45,000, Aspire Youth and Family Kids at Work \$70,312, JCPC Administration \$9,534, Arts Related Innovative Student Empowerment (ARISE) Union-KRE8IVU \$60,000, Union County Community Service's and Outreach Parenting Support \$17,000 (increase by \$6,250), and \$0 (decrease of 6,250) of unallocated funds that will be reassigned later in the fiscal year as needed.

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

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

FINANCIAL IMPACT:

The County will provide \$6,738 in local in-kind match for the Union County Parenting Support Program. No other County funding is required for local funding or the local in-kind match for all other JCPC Programs.

Union County
NC DPS - Community Programs - County Funding Plan

Available Funds: \$ 476,439 Local Match: \$ 143,902 Rate: 30%

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

#	Program Provider	DPS-JCPC Funding	LOCAL FUNDING			OTHER State/Federal	OTHER Funds	Total	% Non DPS-JCPC Program Revenues
			County Cash Match	Local Cash Match	Local In-Kind				
1	Life Connections of the Carolinas-DASH Counseling Services	\$146,593			\$44,334		\$190,927	23%	
2	Transforming Youth Movement, INC-Get Hired-Youth Employability Program	\$40,000			\$12,288		\$52,288	24%	
3	Transforming Youth Movement, INC-SHIFT Resitution and Community Service	\$88,000			\$26,880		\$114,880	23%	
4	Transforming Youth Movement, INC-Union County Teen Court Program	\$45,000			\$14,592		\$59,592	24%	
5	Aspire Youth & Family, Inc.-Kids At Work! Union	\$70,312			\$21,100		\$91,412	23%	
6	Union County-JCPC Administration	\$9,534					\$9,534		
7	A.R.I.S.E-Union-Kre8ivU	\$60,000			\$19,490		\$79,490	25%	
8	Parenting Support	\$17,000			\$5,218		\$22,218	23%	
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
TOTALS:		\$476,439			\$143,902		\$620,341	23%	

The above plan was derived through a planning process by the Union County 2024-2025 Juvenile Crime Prevention Council and represents the County's Plan for use of these funds in FY 2024-2025

Amount of Unallocated Funds _____

Amount of funds reverted back to DPS _____

Discretionary Funds added _____

check type initial plan update final

—DPS Use Only—

Reviewed by Sherril Hill 12.5.24
Area Consultant Date

Reviewed by Macy Nish 12.6.24
Program Assistant Date

Verified by _____
Designated State Office Staff Date

John Kuleptina 12-11-24
 Chairperson, Juvenile Crime Prevention Council (Date)

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

BUDGET AMENDMENT

BUDGET GENERAL FUNDS - BUSINESS PARTNERS REQUESTED BY Beverly Liles
 FISCAL YEAR FY 2025 DATE December 16, 2024

INCREASE

Description
 JCPC - Parental Support Program 6,250

DECREASE

Description
 JCPC - Unallocated Funds 6,250

Explanation Re-allocate unallocated JCPC funds from Unallocated resources (Project 17613) to Parental Support Program (Project 17605).

DATE 12/16/2024

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>
10114450-4441-17613	JCPC-Unalloc-State Grants	<u>6,250</u>
10114450-5381-17605	JCPC-Par Support- Oth Prof	<u>6,250</u>
_____	_____	_____
_____	_____	_____

CREDIT

<u>Code</u>	<u>Account</u>	<u>Amount</u>
10114450-4441-17605	JCPC-Par Support-St Grants	<u>6,250</u>
10114450-5694-17613	JCPC-Unalloc-Pmts Out Orgs	<u>6,250</u>
_____	_____	_____
_____	_____	_____

Total 12,500

Total 12,500

Prepared By ga
 Posted By _____
 Date _____

Number 16



Union County, NC

Staff Report

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

File #: 24-835

Agenda Date: 12/16/2024

TITLE:

Budget Amendment - WIC Program, Community Support and Outreach

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Recognize, receive, and appropriate \$47,250 of additional Agreement Addendum funding for WIC Client Services to the Community Support and Outreach Division's operating budget and 2) approve Budget Amendment #13.

PRIOR BOARD ACTIONS:

- 1) July 17, 2023, Regular Meeting, Agenda Item # 23-444 - Contract Amendment - WIC Program Nutritionist Services.
- 2) June 17, 2024, Regular Meeting, Agenda Item # 24-400 - Contract Amendment - WIC Program Nutritionist Services.
- 3) July 15, 2024, Regular Meeting, Agenda Item # 24-484 - Budget Amendment - WIC Program Nutritionist Services.
- 4) November 18, 2024, Regular Meeting, Agenda Item # 24-781 - Contract Amendment- WIC Program Nutritionist Services

BACKGROUND:

The Special Supplemental Nutrition Program for Women, Infants and Children (WIC) is part of the Union County Human Services Agency's Community Support and Outreach Division. WIC serves to safeguard the health of low-to-moderate income pregnant, postpartum, and breastfeeding women, infants and children up to age five (5) who are at nutritional risk. The WIC program provides nutritious foods to supplement diets, referrals to health care and education on healthy eating from specially trained WIC nutritionists. As a result of COVID-19 and other current events, many families have been faced with economic hardships, leading to a significant sustained increase in the need for WIC services. In FY2020, our clinic served an average caseload of 2,909 clients per month. Year-to-date in FY2025, our monthly average increased to 4,260 clients, representing a growth of over 46%. To ensure that clients and new applicants are served in accordance with Federal regulations, we have contracted with Nutrition Plus, who provides us with one FTE of a WIC Nutritionist. Our original contract with Nutrition Plus, Contract #7982, was executed on December 1, 2022 with a not to exceed amount of \$25,000; an amendment was approved on April 13, 2023 adding \$24,500 to the not to exceed amount of \$25,000, for a total of \$49,500. Neither of these required board action. On July 17, 2023, the BOCC approved a contract amendment, which increased the not to exceed amount on the contract from \$49,500 to \$107,500 and extended the contract end date to June 30,

2024. An amendment was approved on January 25, 2024 adding \$31,040, which did not require board action and increased the not to exceed amount to \$138,540. On June 17, 2024, the BOCC approved a contract amendment, which increased the not to exceed amount on the contract from \$138,540 to \$163,540 and extended the term through September 30, 2024. To address the sustained high need, the North Carolina Department of Health and Human Services (NC DHHS) has continually adjusted the allocation of funds to WIC clinics that serve more than 100% of the caseload assigned by the state. Consequently, Union County WIC received an overall funding boost for FY2025. As a result, we utilized \$17,349 from the initial AA increase to increase the not to exceed on the Nutrition Plus of Greenville, Inc. contract from \$163,540 to \$180,889 and extended the contract expiration date with Nutrition Plus from September 30, 2024 to June 30, 2025. This did not require board action. An additional WIC AA increase of \$47,250 was announced on September 30, 2024 and the total not to exceed amount was increased from \$180,889 to \$228,139 at the last board meeting. We are asking for the board to approve Budget Amendment #13 for the additional \$47,250.

The Human Services Agency Community Support and Outreach Division has utilized the contractual services of Nutrition Plus for WIC Program Nutritionist since December 2022. Nutrition Plus of Greenville, Inc has been effective and efficient in meeting our service needs.

FINANCIAL IMPACT:

Additional funding of \$47,250 is awarded at 100% with no required County match.

BUDGET AMENDMENT

BUDGET General Fund
 FISCAL YEAR FY 2025

REQUESTED BY Stephanie Starr
 DATE October 31, 2024

INCREASE

<u>Description</u>	
Federal Grants - Dept. Public Health	47,250
Professional Services - Nutrition Services	47,250
_____	_____
_____	_____

DECREASE

<u>Description</u>	
_____	_____
_____	_____
_____	_____

Explanation: Additional Federal funding received for the Women, Infants, and Children (WIC) special supplemental nutrition program due to higher than normal caseloads

DATE 11/18/2024

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>
10130531-5381-11462	Professional Svcs - Nutrition	47,250
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

CREDIT

<u>Code</u>	<u>Account</u>	
101-30531-4320-11462	Fed Grant - Dept. Public Health	47,250
_____	_____	_____
_____	_____	_____
_____	_____	_____
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total 47,250

Total 47,250

Prepared By JBH
 Posted By [Signature]
 Date 11/21/24

Number 13

Journal # 223



Union County, NC

Staff Report

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

File #: 24-839

Agenda Date: 12/16/2024

TITLE:

Budget Amendment - Child Fatality Prevention Team

INFORMATION CONTACT:

Dennis Joyner, Human Services Agency, Public Health Director, 704-296-4801

ACTION REQUESTED:

- 1) Recognize, receive, and appropriate \$2,400 in additional state funding from the NC Division of Public Health for the Union County Child Fatality Prevention Team (Agreement Addendum 701) and
- 2) approve Budget Amendment 17.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

North Carolina Session Law (NCSL) 2023-134 enacted changes to strengthen the state's child fatality prevention system which included the establishment of a State Office of Child Fatality Prevention within the Division of Public Health (DPH), Department of Health and Human Services (the Department), made changes to the Child Fatality Prevention System, and made it mandatory to report child fatalities into the National Fatality Review Case Reporting System (NFR-CRS).

The NFR-CRS is a web-based system hosted by the National Center for Fatality Review and Prevention within the Center for National Prevention Initiatives of the Michigan Public Health Institute (MPHI) and is used by many states to provide child death review teams with a data system for capturing, analyzing, and reporting of information shared at a child death or serious injury review.

Per NCSL 2023-134: "Not later than July 1, 2025, the Department shall ensure through its State Office of Child Fatality Prevention that all Local Teams [including Local Health Departments/Districts] have been provided guidelines and training addressing their participation in the NFR-CRS, and Local Teams shall begin utilizing the System for case reporting as specified in G.S. 7B-1413.5." The Union County Human Services Agency coordinates our single county, multidisciplinary child death review team pursuant to Article 14 of Chapter 7B of the General Statutes.

This Agreement Addendum provides funding for the Local Health Department to prepare and begin using the NFR-CRS. Funds were appropriated by the North Carolina General Assembly to support implementation of the changes authorized by NCSL 2023-134 to restructure child death reviews by Local Teams and to offset the costs associated with Local Team participation in NFR-CRS.

FINANCIAL IMPACT:

The County will receive \$2,400 in FY2025 funding from the NC Division of Public Health. No County match is required.

Division of Public Health

Agreement Addendum

FY 24-25

Union County Consolidated Human Services
 Agency, Division of Public Health

Local Health Department Legal Name

State Office of Child Fatality Prevention

DPH Section / Branch Name

701 Child Fatality Case Reporting

Activity Number and Description

Stacie Turpin Saunders, 919-397-6238
 Stacie.TurpinSaunders@dhhs.nc.gov

DPH Program Contact
 (name, phone number, and email)

07/01/2024 – 05/31/2025

Service Period

DPH Program Signature **Date**
 (only required for a negotiable Agreement Addendum)

08/01/2024 – 06/30/2025

Payment Period

- Original Agreement Addendum
- Agreement Addendum Revision # ____

I. Background:

North Carolina Session Law (NCSL) 2023-134 enacted changes to strengthen the state’s child fatality prevention system which included the establishment of a State Office of Child Fatality Prevention within the Division of Public Health (DPH), Department of Health and Human Services (the Department), made changes to the Child Fatality Prevention System, and made it mandatory to report child fatalities into the National Fatality Review Case Reporting System (NFR-CRS).

The NFR-CRS is a web-based system hosted by the National Center for Fatality Review and Prevention within the Center for National Prevention Initiatives of the Michigan Public Health Institute (MPHI) and is used by many states to provide child death review teams with a data system for capturing, analyzing, and reporting of information shared at a child death or serious injury review. MPHI has a Cooperative Agreement with the Maternal and Child Health Bureau, Health Resources and Services Administration, U.S. Department of Health and Human Services, to manage the National Center for Fatality Review and Prevention.

Per NCSL 2023-134: “Not later than July 1, 2025, the Department shall ensure through its State Office of Child Fatality Prevention that all Local Teams [including Local Health Departments/Districts] have been provided guidelines and training addressing their participation in the NFR-CRS, and Local Teams shall begin utilizing the System for case reporting as specified in G.S. 7B-1413.5.” Local Teams are defined as a multidisciplinary child death review team that is either a single or multicounty team responsible for performing any type of child fatality review pursuant to Article 14 of Chapter 7B of the General Statutes.

 Health Director Signature (use blue ink or verifiable digital signature)

 Date

LHD to complete: [For DPH to contact in case follow-up information is needed.]	LHD program contact name: _____ Phone and email address: _____
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II. Purpose:

This Agreement Addendum provides funding for the Local Health Department to prepare and begin using the NFR-CRS. Funds were appropriated by the North Carolina General Assembly to support implementation of the changes authorized by NCSL 2023-134 to restructure child death reviews by Local Teams and to offset the costs associated with Local Team participation in NFR-CRS.

III. Scope of Work and Deliverables:

The Local Health Department (LHD) shall:

1. Sign an agreement with DPH to gain access to and use the NFR-CRS system and data by no later than April 1, 2025. Pursuant to N.C.G.S. 7B-1413.5, Local Teams shall utilize NFR-CRS for the purpose of collecting, analyzing, and reporting on information learned through child death reviews in a manner consistent with North Carolina law.
2. By May 1, 2025, identify and designate one LHD staff member to complete all child fatality case reporting in NFR-CRS. (This LHD staff member will participate in future ongoing NFR-CRS training provided by DPH.)
3. As of January 1, 2025, reorganize its Child Fatality Prevention Team (CCPT) and its Child Fatality Prevention Team (CFPT) into a single combined team to be referred to as the Local Team.
4. Ensure that the Local Team appoints one member to be Chairperson by January 1, 2025. This person will work directly with the LHD's health director and the director of the county department of social services.
5. Ensure that the Local Team appoint one member to be Review Coordinator by January 1, 2025. This role provides administrative and clerical support to the Local Team.
6. Ensure that the Local Team is comprised of individuals with the following roles:
 - a. Director of the county department of social services or the director of the consolidated human services agency
 - b. Additional staff member of the county department of social services or the consolidated human services agency
 - c. Director of the local department of public health
 - d. Local law enforcement officer
 - e. Attorney from the district attorney's office
 - f. Executive director of the local community action agency, or designee
 - g. Superintendent of each local school administrative unit located in the county, or designee
 - h. Member of the county board of social services
 - i. Local mental health professional
 - j. Local guardian ad litem coordinator, or designee
 - k. Local health care provider
 - l. Emergency medical services provider or firefighter
 - m. District court judge
 - n. County medical examiner
 - o. Representative of a local childcare facility or Head Start program
 - p. Parent of a child who died before reaching the child's eighteenth birthday.

7. Require every Local Team member to sign a confidentiality statement and inform each member that they are subject to the provisions of G.S. 7B-1413.
8. In order to support the Local Team's review needs, allow additional individuals to serve as ad hoc members at the chairperson's discretion. The chairperson may invite a maximum of five additional individuals to participate on the Local Team on an ad hoc basis for a specific review if the chairperson believes the individual's subject matter expertise or position within an organization will enhance the ability of the Local Team to conduct an effective review. These ad hoc members may be from outside of the county or counties served by the Local Team.

As a condition of participating in a specific review, each ad hoc member is required to sign the same confidentiality statement signed by a Local Team member and is subject to the provisions of G.S. 7B-1413.

9. Work with the State Office of Child Fatality Prevention in developing the Local Team's process and structure for appointing Ad Hoc members that best supports high quality reviews.
10. Starting January 1, 2025, ensure that the Local Team reviews child deaths according to G.S. § 7B-1406.5; meeting once between January 1 and March 31, 2025 and once between April 1 and May 31, 2025.
 - a. Mandatory reviews include child deaths of resident children under age 18 in the county or counties comprising the Local Team that fall under one of the following categories of death:
 1. Undetermined causes.
 2. Unintentional injury.
 3. Violence.
 4. Motor vehicle incidents.
 5. Pursuant to criteria set forth in G.S. 7B-1407.5, deaths related to child maltreatment or child deaths involving a child or child's family who was reported or known to child protective services.
 6. Sudden unexpected infant death.
 7. Suicide.
 8. Deaths not expected in the next six months.
 9. Additional infant deaths according to the criteria established by the State Office under G.S. 7B-1407.6.
 - b. For cases in which a Local Team is uncertain whether a death falls under one of the categories listed in Subparagraph a. above, the State Office of Child Fatality Prevention shall consult with the Office of the Chief Medical Examiner and appropriate medical professionals to make that determination.

IV. Performance Measures / Reporting Requirements:

1. Performance Measures:

- a. By April 1, 2025, sign an agreement to gain access to and use the NFR-CRS system and data.
- b. By January 1, 2025, notify the DPH Program Contact of the appointed chairperson, providing the individual's name, address, email address, and phone number.
- c. By January 1, 2025, notify the DPH Program Contact of the appointed review coordinator, providing the individual's name, address, email address, and phone number.

- d. By May 1, 2025, notify the DPH Program Contact of the designated LHD staff member to complete all child fatality case reporting in NFR-CRS, providing the individual's name, address, email address, and phone number.

2. Reporting Requirements:

- a. **End-of-Year Performance Report:** Submit report identifying Local Team accomplishments and activities via Smartsheet¹ by May 31, 2025.

3. Reporting Required Subcontract Information

In accordance with revised NCDHHS guidelines effective October 1, 2024, the LHD must provide the information listed below for every subcontract receiving funding from the LHD to carry out any or all of this Agreement Addendum's work.

This information is not to be returned with the signed Agreement Addendum (AA) but is to be provided to DPH when the entities are known by the LHD.

- a. Subcontracts are contracts or agreements issued by the LHD to a vendor ("Subcontractor") or a pass-through entity ("Subrecipient").
1. Subcontractors are vendors hired by the LHD via a contract to provide a good or service required by the LHD to perform or accomplish specific work outlined in the executed AA. For example, if the LHD needed to build a data system to satisfy an AA's reporting requirements, the vendor hired by the LHD to build the data system would be a Subcontractor. (However, not all Vendors are considered Subcontractors. Entities performing general administrative services for the LHD (e.g., certified professional accountants) are not considered Subcontractors.)
 2. Subrecipients of the LHD are those that receive DPH pass-through funding from the LHD via a contract or agreement for them to carry out all or a portion of the programmatic responsibilities outlined in the executed AA. (Subrecipients are also referred to as Subgrantees in NCAC.)

The following information must be submitted via Smartsheet for review prior to the entity being awarded a contract or agreement from the LHD:

- Organization or Individual's Name (if an individual, include the person's title)
- EIN or Tax ID
- Street Address or PO Box
- City, State and ZIP Code
- Contact Name
- Contact Email
- Contact Telephone
- Fiscal Year End Date (of the entity)
- State whether the entity is functioning as a pass-through entity Subcontractor or Subrecipient of the LHD.

V. Performance Monitoring and Quality Assurance:

The State Office of Child Fatality Prevention shall maintain contact via email and telephone to monitor programmatic and fiscal performance. The DPH Program Contact will monitor the performance based on information obtained from data in NFR-CRS. The DPH Program Contact will follow up with Local Team chairperson, as needed, for consultation and performance improvement.

¹ <https://app.smartsheet.com/b/publish?EQBCT=82018408e7b44ef9b44e113b6e536ffb>

If the LHD is deemed out of compliance, not meeting scope of work and deliverables, the DPH Program Contact shall work with the LHD to produce a corrective action plan (CAP). The CAP will include timeline requirements and additional meetings with State Office of Child Fatality Prevention staff in order to get the LHD back to meeting project standards. Failure to comply with the CAP may result in a decrease in funding or removal from consideration for future funding for related activities.

VI. **Funding Guidelines or Restrictions:**

1. **Federal Funding Requirements:** where federal grant dollars received by the Division of Public Health (DPH) are passed through to the Local Health Department (LHD) for all or any part of this Agreement Addendum (AA).
 - a. **Requirements for Pass-through Entities:** In compliance with 2 CFR §200.331 – *Requirements for pass-through entities*, DPH provides Federal Award Reporting Supplements (FASs) to the LHD receiving federally funded AAs.
 1. **Definition:** An FAS discloses the required elements of a single federal award. FASs address elements of federal funding sources only; state funding elements will not be included in the FAS. An AA funded by more than one federal award will receive a disclosure FAS for each federal award.
 2. **Frequency:** An FAS will be generated as DPH receives information for federal grants. FASs will be issued to the LHD throughout the state fiscal year. For a federally funded AA, an FAS will accompany the original AA. If an AA is revised and if the revision affects federal funds, the AA Revision will include an FAS. FASs can also be sent to the LHD even if no change is needed to an AA. In those instances, the FAS will be sent to provide newly received federal grant information for funds already allocated in the existing AA.
 - b. **Required Reporting Certifications:** Per the revised Uniform Guidance, 2 CFR 200, if awarded federal pass-through funds, the LHD as well as all subrecipients of the LHD must certify the following whenever 1) applying for funds, 2) requesting payment, and 3) submitting financial reports:

“I certify to the best of my knowledge and belief that the information provided herein is true, complete, and accurate. I am aware that the provision of false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative consequences including, but not limited to violations of U.S. Code Title 18, Sections 2, 1001, 1343 and Title 31, Sections 3729-3730 and 3801-3812.”
2. This AA is funded with 100% State Appropriations allocated under NCSL 2023-134.

Activity 701	AA	131304 2B22911 2000000000	Total Allocated	Proposed Total	New Total
Service Period		07/01-05/31			
Payment Period		08/01-06/30			
01 Alamance	* 0	2,380	\$0.00	2,380	2,380
D1 Albemarle	* 0	6,722	\$0.00	6,722	6,722
02 Alexander	* 0	865	\$0.00	865	865
04 Anson	* 0	1,485	\$0.00	1,485	1,485
D2 Appalachian	* 0	1,785	\$0.00	1,785	1,785
07 Beaufort	* 0	1,127	\$0.00	1,127	1,127
09 Bladen	* 0	824	\$0.00	824	824
10 Brunswick	* 0	1,430	\$0.00	1,430	1,430
11 Buncombe	* 0	2,582	\$0.00	2,582	2,582
12 Burke	* 0	1,309	\$0.00	1,309	1,309
13 Cabarrus	* 0	2,743	\$0.00	2,743	2,743
14 Caldwell	* 0	1,390	\$0.00	1,390	1,390
16 Carteret	* 0	1,127	\$0.00	1,127	1,127
17 Caswell	* 0	622	\$0.00	622	622
18 Catawba	* 0	2,259	\$0.00	2,259	2,259
19 Chatham	* 0	1,168	\$0.00	1,168	1,168
20 Cherokee	* 0	844	\$0.00	844	844
22 Clay	* 0	521	\$0.00	521	521
23 Cleveland	* 0	1,754	\$0.00	1,754	1,754
24 Columbus	* 0	1,687	\$0.00	1,687	1,687
25 Craven	* 0	1,895	\$0.00	1,895	1,895
26 Cumberland	* 0	7,869	\$0.00	7,869	7,869
28 Dare	* 0	562	\$0.00	562	562
29 Davidson	* 0	2,380	\$0.00	2,380	2,380
30 Davie	* 0	966	\$0.00	966	966
31 Duplin	* 0	1,949	\$0.00	1,949	1,949
32 Durham	* 0	4,461	\$0.00	4,461	4,461
33 Edgecombe	* 0	2,051	\$0.00	2,051	2,051
D7 Foothills	* 0	1,890	\$0.00	1,890	1,890
34 Forsyth	* 0	6,117	\$0.00	6,117	6,117
35 Franklin	* 0	1,349	\$0.00	1,349	1,349
36 Gaston	* 0	3,572	\$0.00	3,572	3,572
38 Graham	* 0	420	\$0.00	420	420
D3 Gran-Vance	* 0	3,016	\$0.00	3,016	3,016
40 Greene	* 0	1,323	\$0.00	1,323	1,323
41 Guilford	* 0	7,996	\$0.00	7,996	7,996
42 Halifax	* 0	1,990	\$0.00	1,990	1,990
43 Harnett	* 0	2,319	\$0.00	2,319	2,319
44 Haywood	* 0	1,006	\$0.00	1,006	1,006
45 Henderson	* 0	1,572	\$0.00	1,572	1,572
47 Hoke	* 0	2,313	\$0.00	2,313	2,313
48 Hyde	* 0	1,061	\$0.00	1,061	1,061
49 Iredell	* 0	2,541	\$0.00	2,541	2,541
50 Jackson	* 0	642	\$0.00	642	642

51 Johnston	* 0	2,885	\$0.00	2,885	2,885
52 Jones	* 0	602	\$0.00	602	602
53 Lee	* 0	1,909	\$0.00	1,909	1,909
54 Lenoir	* 0	2,010	\$0.00	2,010	2,010
55 Lincoln	* 0	1,289	\$0.00	1,289	1,289
56 Macon	* 0	683	\$0.00	683	683
57 Madison	* 0	582	\$0.00	582	582
D4 M-T-W	* 0	3,006	\$0.00	3,006	3,006
60 Mecklenburg	* 0	13,713	\$0.00	13,713	13,713
62 Montgomery	* 0	683	\$0.00	683	683
63 Moore	* 0	1,531	\$0.00	1,531	1,531
64 Nash	* 0	1,673	\$0.00	1,673	1,673
65 New Hanover	* 0	2,198	\$0.00	2,198	2,198
66 Northampton	* 0	1,263	\$0.00	1,263	1,263
67 Onslow	* 0	3,632	\$0.00	3,632	3,632
68 Orange	* 0	1,935	\$0.00	1,935	1,935
69 Pamlico	* 0	582	\$0.00	582	582
71 Pender	* 0	986	\$0.00	986	986
73 Person	* 0	824	\$0.00	824	824
74 Pitt	* 0	3,733	\$0.00	3,733	3,733
75 Polk	* 0	501	\$0.00	501	501
76 Randolph	* 0	2,663	\$0.00	2,663	2,663
77 Richmond	* 0	2,152	\$0.00	2,152	2,152
78 Robeson	* 0	3,929	\$0.00	3,929	3,929
79 Rockingham	* 0	1,511	\$0.00	1,511	1,511
80 Rowan	* 0	2,178	\$0.00	2,178	2,178
82 Sampson	* 0	1,970	\$0.00	1,970	1,970
83 Scotland	* 0	1,747	\$0.00	1,747	1,747
84 Stanly	* 0	1,208	\$0.00	1,208	1,208
85 Stokes	* 0	804	\$0.00	804	804
86 Surry	* 0	1,147	\$0.00	1,147	1,147
87 Swain	* 0	1,323	\$0.00	1,323	1,323
D6 Toe River	* 0	1,042	\$0.00	1,042	1,042
88 Transylvania	* 0	764	\$0.00	764	764
90 Union	* 0	2,400	\$0.00	2,400	2,400
92 Wake	* 0	11,935	\$0.00	11,935	11,935
93 Warren	* 0	1,263	\$0.00	1,263	1,263
96 Wayne	* 0	3,606	\$0.00	3,606	3,606
97 Wilkes	* 0	1,309	\$0.00	1,309	1,309
98 Wilson	* 0	2,495	\$0.00	2,495	2,495
99 Yadkin	* 0	945	\$0.00	945	945
00 Yancey	* 0	501	\$0.00	501	501
Totals		188,996	0	188,996	188,996

Sign and Date - DPH Program Administrator <i>Andrea Catalano</i> 10/30/24	Sign and Date - DPH Section Chief <i>M. Mauldin</i> 11.04.2024
Sign and Date - DPH Budget Office – ATC Coordinator <i>Sarah Muffin</i> 11/5/2024	Sign and Date - DPH Budget Officer <i>April Johnson</i> 11/7/2024

kb 11/7/24

BUDGET AMENDMENT

BUDGET General Fund REQUESTED BY Dennis Joyner
 FISCAL YEAR FY 2025 DATE December 16, 2024

INCREASE

DECREASE

Description		Description	
State Grant	2,400		
Operating Expenditures	2,400		

Explanation: To recognize, receive, and appropriate funding for Public Health from the State's Agreement Addendum 701, Child Fatality Case Reporting.

DATE _____

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

FOR POSTING PURPOSES ONLY

<u>DEBIT</u>			<u>CREDIT</u>		
Code	Account	Amount	Code	Account	Amount
10130510-5239-11420	Medical Supplies	2,400	10130510-4420-11420	State Grant	2,400
Total		2,400	Total		2,400
Prepared By		BH			
Posted By					
Date			Number		17



Union County, NC

Staff Report

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

File #: 24-846

Agenda Date: 12/16/2024

TITLE:

Contract Renewal - Dental Laboratory Services

INFORMATION CONTACT:

Dennis Joyner, Human Services Agency - Department of Public Health, Director, 704-296-4801

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Human Services Agency's Public Health Department provides various dental clinic services for patients that must be processed by an "outside" laboratory such as dentures. Brantley Dental Laboratory currently processes lab services for the Public Health Department through contract #8619. A requested third amendment for \$25,000 will cover a one-year term and will result in a cumulative spend with the vendor that exceeds the County Manager's \$50,000 allowable signing authority, therefore, BOCC approval of Contract Amendment #3 is required.

The Public Health Department has utilized the contractual services of Brantley Dental Laboratory for services since November 2020. The contractor has been effective and efficient in meeting our service & patient care needs, and we are requesting to continue this service for an additional one-year term. The Department will collaborate with Procurement for solicitation options in the future.

FINANCIAL IMPACT:

The anticipated annual cost for this service is \$25,000.00 and is budgeted accordingly for FY2025, with future expenditures subject to annual BOCC budget appropriation.

COUNTY OF UNION

This Amendment, made and entered into as of _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina, hereinafter referred to as "Union," and BRANTLEY DENTAL LAB, hereinafter referred to as "Contractor," shall modify as indicated that agreement between the parties dated November 3, 2020, as modified by Amendments dated March 10, 2023, and January 3, 2024, hereinafter referred to as the "Agreement."

W I T N E S S E T H:

WHEREAS, Contractor and Union entered into an Agreement pursuant to which Contractor would provide Union with certain dental laboratory services for Union's Public Health Department; and

WHEREAS, Union now desires to extend the term of the Agreement for one (1) year; and

WHEREAS, Contractor's rates for services have changed since the Agreement was executed; and

WHEREAS, Contractor is willing to continue to provide the services during the extended term.

NOW, THEREFORE, in consideration of the parties' continuing obligations under the Agreement and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto do each contract and agree with the other as follows:

1. The parties agree to extend the term of the Agreement for one (1) year, beginning November 3, 2024, and ending November 2, 2025.
2. The parties agree the attached Revised Scope of Work reflects changes in the rates for services. To the extent the Revised Scope of Work conflicts with the Scope of Work attached to the Agreement, the Revised Scope of Work shall govern. All other rates remain as stated in the Scope of Work attached to the Agreement.
3. Each signatory below warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Amendment. Each signatory further warrants that the execution, delivery and performance by it of this Amendment and the Agreement has been duly authorized and approved by all requisite action of the party's management and appropriate governing body.
4. Except as herein amended, the terms and provisions of the Agreement shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto, acting under authority of their respective governing bodies, have hereunto set their hands and seals and caused this Amendment to be duly executed, this the day and year first above written.

UNION COUNTY

BRANTLEY DENTAL LAB

By: _____ (SEAL)
Brian W. Matthews, County Manager

By: _____ (SEAL)

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

Deputy Finance Officer

BRANTLEY DENTAL LAB

FEE SCHEDULE

2024/2025

Upper and Lower Full Denture.....\$245.00 ea.

Upper and Lower Acrylic Partial.....\$150.00 ea.

Upper and Lower Flex Partial.....\$285.00 ea.

Upper and Lower Cast Partial.....\$330.00 ea.

Upper and Lower Unilateral Partial.\$225.00 ea.

(On all Partials there is a tooth charge of \$8.00 per tooth)

Custom Trays.....\$37.00 ea.

Bite Blocks.....\$21.00 ea.

Relines (all).....\$145.00
Soft Night Guards.....\$75.00 ea.
Repair (Cold Cure).....\$60.00 +
Repair (Processed).....\$150.00 +
Repair (Clasp).....\$32.00 ea.



Union County, NC

Staff Report

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

File #: 24-852

Agenda Date: 12/16/2024

TITLE:

Grant Application - Transportation FY2026 Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program

INFORMATION CONTACT:

Theresa Torres, Human Services Agency, Transportation Director, 704-283-3598

ACTION REQUESTED:

Authorize the County Manager: to 1) submit the 5310 Urbanized Area Grant application and make necessary assurances and certifications associated with the grant application, 2) upon award of the grant, to negotiate and execute an agreement, and 3) upon receipt of the grant funds, to recognize, receive, and appropriate the awarded amount to the Transportation budget, all as substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Section 5310 program (49 U.S.C. 5310) provides formula funding to states to assist private nonprofit groups meet the transportation needs of older adults and people with disabilities when transportation service is unavailable, insufficient, or inappropriate to meet the needs of these residents. The 5310 program aims to remove barriers to transportation services and expand mobility options for seniors and individuals with disabilities by supporting services planned, designed, and carried out to meet the unique transportation needs of these residents in all areas - large urbanized (over 200,000), small urbanized (50,000-200,000), and rural (under 50,000). Funds are apportioned based on each state's share of the population, then direct recipients manage and distribute funds to sub-recipient projects.

The Human Services Agency Transportation Department will submit the grant application as a sub-recipient through the Charlotte Area Transit System (CATS), and our local agreement will be with the City of Charlotte. Union County's grant application will leverage our Home and Community Care Block Grant (HCCBG) funding to serve as the local match required to enable us to obtain the additional 5310 grant funding, thereby ensuring more seniors can access needed services by utilizing our transportation system. Transportation staff has the capability to manage this grant and has been receiving and managing this 5310 funding since January 2016. FY2026 grant funding will allow us to continue meeting the needs of current and future residents who are eligible for services under this funding structure. Our goal is to serve 200+ seniors age 65+ and/or age 50+ disabled individuals currently being served by our system under this funding.

The 5310 grant requires a 50% Federal/ 50% Local cost split for demand response service operations. The performance period is for two funding years, meaning funds awarded during a given fiscal year can be drawn down for two years after the start of the award's fiscal year.

FINANCIAL IMPACT:

The total 5310 Grant operating request of \$400,000 for the two-year period from July 1, 2026, through June 30, 2028, is 50% Federal Grant (\$200,000) and 50% Local Match (\$200,000).

FY 2023

CALL FOR PROJECTS &
GRANT APPLICATION

CHARLOTTE-MECKLENBURG
URBANIZED AREA'S

ENHANCED MOBILITY OF SENIORS AND INDIVIDUALS
WITH DISABILITIES PROGRAM (SECTION 5310)

RFP 269-2025-1785

NOVEMBER 8, 2024

I. INTRODUCTION & BACKGROUND

In July 2012, Congress authorized a new federal transportation bill, Moving Ahead for Progress in the 21st Century (MAP-21), which consolidated two transit programs under previous legislation (Section 5310: “Transportation for Elderly Persons and Persons with Disabilities” and Section 5317: “New Freedom Program”) into a single: “Enhanced Mobility of Seniors and Individuals with Disabilities” (Section 5310). The purpose of this consolidated program is to provide funds for projects that serve the special needs of transit-dependent populations when traditional public transportation services are insufficient, unavailable, or inappropriate and programs that expand the transportation options beyond those required by the Americans with Disabilities Act (ADA).

Section 5310 Designated Recipient

The City of Charlotte is the Designated Recipient for Section 5310 funds allocated by formula for the Charlotte-Mecklenburg Urbanized Area (Char-Meck UZA). The City’s public transit department, the Charlotte Area Transit System (CATS), administers the program in accordance with federal law and regulations.

This Section 5310 funding application package includes information on funding availability, project eligibility, and the application timeline, among other items.

II. ELIGIBLE PROJECTS & SUBRECIPIENTS

To be eligible for 5310 funding, projects and services must be derived from or included in a locally developed coordinated human services transportation plan. Additionally, eligible Section 5310 projects must serve the urban area where the funds were apportioned (there is either an origin or destination located within the urban boundary). The “Coordinated Transit-Human Services Transportation Plan for the Charlotte Urban Area FY2022-FY2027” can be found at [Charlotte Coordinated Human Services Plan](#)

TRADITIONAL SECTION 5310 PROJECTS. Section 5310 requires that, of the funds apportioned to a designated recipient, no less than fifty-five percent (55%) of the funds must be available for public transportation capital projects that meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable, or inappropriate (Traditional 5310 Projects).

It is not sufficient that seniors and individuals with disabilities are merely included (or assumed to be included) among the people who will benefit from the Project.

1. Eligible Subrecipients for Traditional 5310 Projects:

- a) **Private Non-Profit Organizations.** Subrecipients qualifying as private non-profit organizations must provide a copy of their IRS Tax Identification Number Certificate and a copy of the charter and bylaws as filed with the North Carolina Secretary of State as proof of non-profit eligibility.

b) State or Local Governmental Authorities. According to 49 USC § 5302, this includes a political subdivision of the state, an Indian tribe, or a public corporation, board, or commission established under state law that is:

- (i) Approved by the state to coordinate services for seniors and individuals with disabilities; or
- (ii) Certifies that no nonprofit corporations or associations are readily available in an area to provide the service.

2. Examples of Traditional 5310 Projects.

- Purchase of rolling stock and other capital activities for paratransit service;
- Passenger facilities related to Section 5310-funded vehicles—purchase and installation of benches, shelters and other passenger amenities;
- Related activities and support facilities and equipment for Section 5310-funded vehicles—preventive maintenance, radios and communication equipment, wheelchair lifts and securement devices, computer hardware and software, ITS, dispatch systems, and fare collection systems;
- Lease of Equipment (if more cost-effective than purchase);
- Contracted services (capital and operating included);
- Support for mobility management and coordination programs among public transit providers and human service agencies; and
- Capital activities to support ADA-complementary paratransit service.

A. OTHER SECTION 5310 PROJECTS. Up to 45 percent (45%) of a designated recipient’s annual apportionment may be utilized for public transportation projects that exceed the requirements of the ADA, that improve access to fixed route service and decrease reliance by individuals with disabilities on paratransit, or that provide an alternative to public transportation that assists seniors and individuals with disabilities with transportation.

1. Eligible Subrecipients for Other 5310 Projects include the eligible subrecipients for Traditional 5310 Projects above, as well as:

- (i) **Private Operators of Public Transportation.** In order to receive 5310 Program funding, these recipients must be able to document that they are, and have been providing, shared-ride service (two or more passengers in the same vehicle who are otherwise not traveling together) to the public or to special categories of users on a regular basis.

2. Examples of Other Section 5310 Projects.

- a) Public transportation projects that meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, unavailable or inappropriate (capital only) (see examples above)
- b) Public transportation projects that exceed the requirements of the ADA (capital and operating). Examples include:
 - (i) Expansion of paratransit service area and/or hours;
 - (ii) Cost for providing same day paratransit service;
 - (iii) Enhanced paratransit service—providing escorts or assistance through door;

- (iv) Acquisition of vehicles or equipment to accommodate mobility aids that exceed ADA dimension and load standards;
 - (v) Installation of additional securement locations in buses beyond what is required by the ADA; and
 - (vi) Accessible feeder services.
- c) Public transportation projects that improve access to fixed-route service and decrease reliance on paratransit by individuals with disabilities (capital and operating). Examples include:
- (i) Accessibility improvements to transit and intermodal stations that are not key stations—accessible path to a bus stop; adding elevator, ramps, or detectable warnings; improving signage or wayfinding; technology improvements that enhance accessibility; and
 - (ii) Travel training.
- d) Alternatives to public transportation that assist seniors and individuals with disabilities with transportation (capital and operating). Examples include:
- (i) Purchasing vehicles to support accessible taxi, ride-sharing, or vanpooling programs—must meet regulatory requirements and permit the passenger to remain in his or her mobility device inside the vehicle;
 - (ii) Administration and expenses related to voucher programs offered by human service providers. Transit passes for use on existing fixed route or ADA paratransit service are not eligible; and
 - (iii) Volunteer driver and aide programs.

III. FUNDING REQUIREMENTS

A. SECTION 5310 PROGRAM LOCAL SHARE GUIDANCE

1. **General.** Section 5310 funds may be used to finance capital, operating expenses, and mobility management (MM) projects. The Federal share of eligible capital and MM costs for the Fiscal Year 2023 funds can be (80%) of the net cost of the activity, with local matching funds. The Federal share of the eligible operating costs can be (50%) of the net operating costs of the activity, with local matching funds.

The subrecipient is responsible for securing the local matching funds for their Section 5310 project and all of its local share must be provided from sources other than Federal United States Department of Transportation (USDOT) funds. Local share requirements are flexible to encourage coordination with other federal programs that may provide transportation, such as Health and Human Services or Medicaid. **Fare revenue or user fees generated by the service to be supported by the 5310 Program grant cannot be used as matching funds.** Examples of sources that may be used to meet any or the entire local share requirement include:

- State or local appropriations;
- Dedicated tax revenues;
- Private donations;
- Revenue from human service contracts;

- Net income generated from advertising and concessions;
- Income from contracts to provide human service transportation;
- Other non-USDOT Federal funds that are eligible to be expended for transportation including: employment training, community services, vocational rehabilitation services, and Temporary Assistance for Needy Families (TANF). Examples of other types of federal funding that may be available as a local match can be found at [Federal Fund Braiding Guide](#)

2. **Soft Match.** Non-cash shares such as donations, volunteer services, or in-kind contributions are eligible as long as the value of each is documented and supported, AND it is a cost that would otherwise be eligible under the 5310 Program. **Applicants that intend to use these sources are required to submit an in-kind valuation plan with their application for review and approval by the City.**

In-kind Valuation Plan. In-kind contributions can only be used for operating and mobility management expenses. In-kind contributions are the value of non-cash contributions, received from a third party, for real property, equipment, and/or goods and services directly benefitting and specifically identifiable to the project.

In-kind contributions must be included as project costs, and the value of the services must be documented. If your organization intends to use in-kind contributions as a match, certain conditions apply. Those conditions are:

- a) An In-kind Valuation Plan **MUST BE SUBMITTED AND APPROVED** in writing by the City prior to being used for the project.
- b) Detailed documentation must be submitted that includes, but is not limited to:
 - (1) A statement from the person or organization providing the goods or services;
 - (2) The value of the goods or services; and
 - (3) The goods or services must be necessary for the project.

IV. PROGRAM MEASURES AND REPORTING REQUIREMENTS

The Section 5310 Program has federally mandated reporting requirements. Subrecipients will be required to report on their project each time they make a claim for reimbursement from their funded grant. **Quarterly reports will be required regardless of financial activity.** Subrecipients will submit both quantitative and qualitative information on each of the following measures:

Traditional Section 5310 Projects

1. **Gaps in Service Filled.** Provision of transportation options that would not otherwise be available for seniors and individuals with disabilities measured in numbers of seniors and people with disabilities afforded mobility they would not have without program support as a result of traditional Section 5310 projects implemented in the current reporting year.
2. **Ridership.** Actual or estimated number of rides (as measured by one-way trips) provided at least quarterly for individuals with disabilities and seniors, and Section 5310-supported vehicles, and services as a result of traditional Section 5310 projects implemented in the current reporting year.

Other Section 5310 Projects

1. Increases or enhancements related to geographic coverage, service quality and/or service times that impact availability of transportation service for seniors and individuals with disabilities as a result of other Section 5310 projects implemented in the current reporting year.
2. Additions or changes to physical infrastructure (e.g. transportation facilities, sidewalks, etc.), technology and vehicles that impact availability of transportation services for seniors and individuals with disabilities as a result of other Section 5310 projects implemented in the current reporting year.
3. Actual or estimated number of rides (as measured by one-way trips) provided for seniors and individuals with disabilities as a result of other Section 5310 projects implemented in the current reporting year.

APPLICATION INSTRUCTIONS

This call for projects for the Charlotte-Mecklenburg Urban Area (Char-Meck UZA) will result in grants with a maximum period of performance of two (2) years. **Funding for subsequent years is not guaranteed.** It will be necessary to reapply and go through another competitive process for subsequent funding.

Funded projects will be selected through a competitive process that will be coordinated by the City of Charlotte. All eligible applicants intending to request funds need to ensure their proposed projects are included in the “Coordinated Transit-Human Services Transportation Plan for the Charlotte Urban Area FY2022-FY2027”, which can be downloaded at [Charlotte Coordinated Human Services Plan](#) .

Applicants are strongly encouraged to review the federal Certifications and Assurances in preparation for beginning the application. The Certifications and Assurances contain various federal requirements the applicant must comply with before and during the project. The current *Federal Annual List of Certifications and Assurances for Federal Transit Administration Grants and Cooperative Agreements (C&As)* are found at [FY2023 Annual List of Certifications and Assurances](#) There will be additional contractual provisions to comply with if the project is funded.

Completed applications should be submitted to:

Applications are due **December 20, 2024 by 2:00 pm.** Applications to be delivered as one (1) electronic copy by email to City Procurement Division, Attention: Beverly Hovis at Beverly.Hovis@charlottenc.gov.

Early submittals are encouraged. Do not submit the application without all of the required documents attached. An incomplete application will not be reviewed. No applications will be accepted after the deadline.

Application Timeline

November 8, 2024 - Call for Projects Announcement

November 15, 2024 - Information Session / Webinar

November 8, 2024 – December 20, 2024 - Application Preparation and Submission Period

December 20 – December 31, 2024 - Initial Screening of Applications

January 2, 2024 – January 23, 2025 - Application Evaluation and Scoring

January 23, 2025 - Selection Meeting

January 23 – February 28, 2025 - Prepare Final Application for FTA

February 28 - FTA Receives and Evaluates Application

April 2025 - Award Notifications

SECTION 1: APPLICANT INFORMATION

Legal Name (Agency): _____

Address: _____

City, State, Zip _____

Federal Tax ID Number: _____

Doing Business As (DBA) Name *If applicable* _____

Applicant's **Unique Entity Identifier (UEI)** (Number issued by the System of Award Management (SAM) to identify businesses and other entities that do business with the federal government):
SAM.GOV

Parent Agency's UEI number (*Required only if different than Applicant*):

Project Manager and Title:

Name: _____ Title: _____

Telephone: _____ Fax: _____

Email address: _____

Project's Service Area (*List the county or counties that will be served by the proposed project*):

Organization Type

- Local Government Authority
- Private Non-Profit Organization (*please attach IRS 501(c)(3) documentation of non-profit status and charter and bylaws filed with NC Secretary of State*)
- Operator of Public Transportation Services
- Private Operator of Public Transportation Services

Current Vehicle Inventory:

_____ Vans _____ Vans/Lifts _____ Sedans or Minivans

_____ Buses _____ N/A

Federal Financial Assistance Transparency Act (FFATA) FFATA mandates the disclosure of the names and total compensation of the five most highly compensated officers of an entity if:

- The Applicant received 80% or more of its annual gross revenues in the preceding fiscal year from the federal government (all federal sources, not just FTA); and
- Those revenues were greater than \$25M; and
- The public does not have access to the information through Securities and Exchange Commission or Internal Revenue Service filings as specified in FFATA

Applicant should select “Yes” if they are subject to the reporting requirements of FFATA and “No” if they are not subject to Executive Compensation Reporting

_____ Yes _____ No

<u>Full Name</u>	<u>Total Compensation</u>
1 _____	\$ _____
2 _____	\$ _____
3 _____	\$ _____
4 _____	\$ _____
5 _____	\$ _____

SECTION 2: APPLICANT’S EXISTING SERVICES AND SERVICE AREA

1. What is the Applicant’s organizational mission?

2. Describe the target population(s) the Applicant serves and the existing products and/or services provided to those population(s).

3. Describe the Applicant's qualifications and experience with implementing this type of Project.

4. Provide a brief description of the Applicant's existing service area, including demographic, economic, and geographic information.

SECTION 3: PROJECT INFORMATION

Target Groups (s) to be served by Project:

- Seniors
- Individuals with Disabilities

Project Type: Applicant's should read the descriptions of Traditional and Other 5310 Projects in Article II as the eligibility and reporting requirements are different. If applicant is applying for more than one project, a separate application should be completed for each.

- Traditional Section 5310 Project
- Other Section 5310 Project

	Traditional 5310 Project	Other 5310 Project
Total Project Cost by Budget Type:	Capital \$ _____ Mobility Manager \$ _____	Capital \$ _____ Operating \$ _____ Mobility Manager \$ _____
Total Federal Request Match(es) not included	Total Federal Request \$ _____	Total Federal Request \$ _____

1. Scope of Proposed Services:

	Elderly	Disabled
How many of the targeted population live in the area you propose to serve?		
Of the number listed above, how many have the unmet transit need your project addresses?		
How many people with the unmet transit need will you serve through this project?		

2. Describe the Project Plan in detail including a timeline and milestones for the completion of the Project. This should completely describe what you want to do and how you are going to do it if you receive the requested funding. Although not required, the Applicant may want to attach maps, pictures, marketing plans, draft brochures, charts or graphs in support. If the applicant is working in partnership with or coordinating with other agencies or organizations, letters of support from these agencies or organizations may be attached. For projects seeking operating assistance, provide details of proposed routes, schedules, and trip coordination strategies. For capital projects, explain the quantity and type of assets to be procured, use, useful life, and whether assets are expansion or replacement assets. If the project has multiple elements (i.e., operating, mobility management, capital), please include a description of how these elements relate to each other.

3. **Describe the intended service area that will benefit from your proposed project. Include pertinent demographic information about the service area in your answer.** *Include relevant demographic data and the sources of that data.*

4. **Describe how the Project addresses the identified unmet needs in the Coordinated Human Services Transportation Plan for the Charlotte Urban Area FY2022-FY2027” and provide the page number(s) found in the Coordinated Plan.** The unmet needs are found on pages 24-30 of the Coordinated Plan.

5. **Estimate the annual number of unduplicated passengers who will be served or the number of one-way trips that will be provided from the proposed project.** *Explain how the estimate was determined.*

6. **Describe the qualifications of the key personnel assigned to the project and the percentage of time each person will be involved in the project. Will the applicant need to hire additional personnel to support the project?** *(Please attach resume/curriculum vitae of any key personnel for the Project.)*

7. Describe how the project relates to any federal or other programs that the applicant operates and, if applicable, how the applicant plans to use these resources to leverage this project.

8. How will the applicant sustain the proposed service and maintain any vehicles after the grant period?

SECTION 4: COORDINATION. *The FTA requires that projects funded under Sections 5310 (meet the needs described in the approved locally developed public transportation human service coordinated plan.*

1. Describe how the project will be coordinated with human service agencies, nearby jurisdictions and/or public and private transportation providers. Identify any partnerships that will be involved in the implementation of the project. (i.e. vehicle sharing, scheduling & dispatching center, training, shared rides, shared costs, including the other agency's role(s) in the Project). Attach any letters or agreements as support of coordination with those agencies.

2. Describe how the Applicant will continue to involve key stakeholders throughout the Project life.

3. Describe how the Applicant will market and promote public awareness of the Project.

SECTION 5: IMPLEMENTATION PLAN.

1. Describe the method that will be used to monitor and evaluate the success of this project. List the measurable indicators of success. *Each goal should list the steps/objectives the Applicant will use to measure achievement toward the goal. Please make your goals and objectives clear and assessable as they will be the measure by which the Project will be evaluated.*

2. Explain how the Project relates to other services or programs provided by your agency or firm and demonstrate how it can be achieved within your technical capacity.

3. When could your project begin upon receiving funding? Describe the process your organization would take to implement the project.

SECTION 6: BUDGET

1. **Is there a commitment of funds beyond the requested grant period?** *If yes, please explain the nature of the commitment. If no, please explain the steps you will take to attain sustainability*

PROJECT BUDGET (CAPITAL, OPERATING, MOBILITY MANAGEMENT EXPENSES)

Capital Budget (80/20) Equipment/Facilities	Type of Service	Cost	Federal Share (80%)	Local Share (20%)	Source of Local Share
Total		\$ -	\$ -	\$ -	

Operating Budget (50/50)	Type of Service	Cost	Federal Share (50%)	Local Share (50%)	Source of Local Share
Total		\$ -	\$ -	\$ -	

Mobility Management Budget (80/20)	Type of Service	Cost	Federal Share (80%)	Local Share (20%)	Source of Local Share
Total		\$ -	\$ -	\$ -	

SECTION 7: PROGRAM EFFECTIVENESS AND PERFORMANCE INDICATORS.

1. How does your organization plan to collect information to monitor quality control and customer satisfaction related to implementing the proposed project? Include in your description any measurable indicators you propose to use.

2. Describe how the proposed project aligns with the overarching mission of your organization.

- 3. Describe any experience your organization has as an existing grantee of 5310 funds, or similar fund administration, as well as experience with financial reporting such as quarterly reports, annual audits and/or other forms of financial reporting.**

- 4. Describe any training, maintenance, inspections and/or service monitoring you plan to do focused on managing risk and providing safe services.**

SECTION 8: TRADITIONAL OR OTHER SECTION 5310 PROJECTS.

A. TRADITIONAL 5310 PROJECTS ONLY *(APPLICANT SHOULD ONLY COMPLETE THIS SECTION IF APPLICANT IS APPLYING FOR TRADITIONAL SECTION 5310 FUNDS):*

1. Describe the mobility options for the seniors and/or individuals with disabilities in this service area have now and discuss how your project creates more mobility options.

2. Explain how the capital project you are proposing, enhances the mobility of seniors and/or individuals with disabilities in your service area.

3. According to the Federal Circular, it is not sufficient to assume seniors and/or individuals with disabilities will be included in the traditional 5310 project. Describe the details of the planning and design of your project that establishes that seniors and/or individuals with disabilities will be included in the project.

B. OTHER SECTION 5310 PROJECTS ONLY (APPLICANT SHOULD ONLY COMPLETE THIS SECTION IF APPLICANT IS APPLYING FOR OTHER SECTION 5310 FUNDS):

1. To be funded as an Other 5310 Project, the project must meet at least one of three qualifying criteria including:

- a. Does your project exceed ADA minimum requirements? _____
- b. Does your project improve access to fixed route service and decrease reliance by individuals with disabilities on ADA complementary paratransit service? _____
- c. Does your project provide alternatives to public transportation that assist seniors and/or individuals with disabilities with transportation? _____

2. If you answered 'yes' to any of the questions in 1(a), 1(b) or 1(c) above, describe how your project meets this qualifying criteria.

3. Other 5310 Projects must be planned, designed and carried out to meet the transportation needs of seniors and/or individuals with disabilities, although the service may also be used by the general public. Describe how seniors and/or individuals with disabilities will be targeted and how the general public will be part of the project.

SECTION 9: OTHER INFORMATION

A. APPLICANT CONTACTS

Provide the name, title, address, phone/fax number, and e-mail for the following key contact people for the Project:

1. Executive Director/Chairman of the Board
2. Administrative Contact (person responsible for grant administration)
3. Operations Contact (person responsible for operational issues)
4. Procurement Contact (person responsible for procuring assets and preparing bid packages)
5. Financial Contact (person responsible for billing, accounting, closeouts, reimbursement requests)
6. Audits Contact (responsible for annual audits)
7. Legal Counsel
8. EEO Representatives – An Applicant’s Chief Executive Officer (CEO) should designate an EEO Officer and adequate staff to administer the EEO program. The EEO Officer should be an executive and should report directly to the CEO. Care should be taken to avoid conflicts when assigning responsibility for administering the EEO program as a collateral duty assignment, e.g., a personnel officer may have a conflict of interest.
9. DBE Representative
10. ADA Representative
11. Title VI Representative

B. DOCUMENTS AND RECORDKEEPING

Indicate where the following program records will be retained and provide the name of the individual responsible for maintaining documents.

Document	Location	Name and Title of Responsible Individual
Contract w/ City		
Contract w/ Service Provider		
Civil Rights Records (EEO, Title VI, ADA)		
Financial Records		
Procurement and Bid Documents (Including RFPs)		
Certificates and Assurances		
Others (List)		
Capital Projects		
Vehicle Records		
Non-Vehicle Records		
Transportation Service Projects		
Driver Manifests		
Daily Pre-Trip Forms		
Maintenance Records		
Drug and Alcohol Records		
Ridership Records		

C. PROJECT PERSONNEL

1. **List all positions, names, titles and the number of positions, which will be charged to this grant during the grant period.** Next to each position indicate the percentage of the position/individual salary that will be charged to the grant.

2. For positions that will only be PARTIALLY charged to this grant, describe how the estimated percentage of the salary to be charged to the grant was derived. If percentage of time to be charged to grant is estimated, describe what auditable mechanism(s) will be used to verify the actual time that an individual spends on grant related activities.

3. Are all individuals listed in item 1 above currently working in their job titles? If not, explain what the differences are between their current positions and the position that will be charged to the grant and why they are not working in their grant positions.

4. Attach to this exhibit an official organizational chart showing the reporting/supervisory relationships of each of the positions listed above.

D. THIRD PARTY CONTRACTING

If an applicant is planning to purchase any goods or capital assets from a third party, it must follow the applicable competitive process required by the FTA. If the applicant is planning to contract out service under this grant, then the applicant must list all proposed service to be contracted out (i.e., transportation services, computer routed services, dispatching, auditing, drug and alcohol testing, legal, marketing, maintenance) to a third party. **All bids/RFP/contract awards must have prior CATS review and approval.** A price/cost analysis must be done by the applicant prior to request. See FTA Third Party Contracting Guidelines Circular FTA C 4220.1F.

<u>Bid/RFP/State Contract</u>	<u>Name/Type of Asset/Service</u>	<u>Timeframe</u>	<u>Estimated Cost/Budget</u>

E. SECTION 5310 TITLE VI PROGRAM REPORT

Legal Name of Applicant: _____
(Complete either Part A or Part B)

Part A – No complaints or Lawsuits Filed

I certify that to the best of my knowledge, **No complaints or lawsuits** alleging discrimination have been filed against (*Transit System Name*) _____ during the period July 1, 2023 through June 30, 2024.

Signature of Authorized Official

Type Name and Title of Authorized Official

Date

Part B – Complaints or Lawsuits Filed

I certify that to the best of my knowledge, the below described complaints or lawsuits alleging discrimination have been filed against (*Transit System Name*) _____ during the period July 1, 2023 through June 30, 2024.

Complainant Name/Address/Telephone Number	Date	Description	Status/Outcome

(Attach an additional page if required.)

Signature of Authorized Official

Name and Title of Authorized Official

Date

Please provide a copy of your current Title VI Plan with your Application.

F. SECTION 5310 LOCAL SHARE CERTIFICATION FOR FUNDING

(This form is required for **EACH** separate funding request)

(Legal Name of Applicant)

Local matching funds are optional for application submittals for Fiscal Year 2023. Please list any anticipated Capital and Operating Local matching funds below.

The local match must be provided from sources other than federal Department of Transportation funds. Guidance is provided in Article III above about eligible sources of matching funds. Applicants are responsible for verifying the eligibility of non-USDOT federal funds the applicant proposes to use as their local match.

Requested Funding Amounts

	Net Project Cost	Local Share	Local Source(s)
Capital (Vehicles & Other)	\$ _____	\$ _____ (% of net)	1. _____ 2. _____ 3. _____
Operating	\$ _____	\$ _____ (% of net)	1. _____ 2. _____ 3. _____
TOTAL	\$ _____	\$ _____	

I, the undersigned representing *(Legal Name of Applicant)* _____ do hereby certify to the City of Charlotte, that the required local funds will be available as of **July 1, 2025**.

Signature of Authorized Official

Name and Title of Authorized Official

Date

G. LOBBYING CERTIFICATION

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence a member of the Metropolitan Transit Commission, Charlotte City Council, officer or employee of the Charlotte Area Transit System, or any elected, appointed, or employed official or employee of the State of North Carolina, member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any Federal Contract, or the amendment or modification of any Federal Contract.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence a member of the Metropolitan Transit Commission, Charlotte City Council, officer or employee of the Charlotte Area Transit System, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this Federal Contract, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award of all subcontracts anticipated to be of a value of one hundred thousand dollars (\$100,000.00) or more and that all subcontractors shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. §1352. Any person who fails to file the required certification shall be subject to a civil penalty of not less than ten thousand dollars (\$10,000.00) and not more than one hundred thousand dollars (\$100,000.00) for each such failure.

Signature: _____ Date: _____

Title: _____ Telephone No. (____) _____

Firm or Corporate Name: _____

Address: _____

DISCLOSURE FORM TO REPORT LOBBYING

DISCLOSURE OF LOBBYING ACTIVITIES Complete this form to disclose lobbying activities pursuant to 31 U.S.C. §1352 (See below for public burden disclosure)		Approved by OMB 0348-0046
1. Type of Federal Action: <input type="checkbox"/> a. Contract <input type="checkbox"/> b. Grant <input type="checkbox"/> c. Cooperative agreement <input type="checkbox"/> d. Loan <input type="checkbox"/> e. Loan guarantee <input type="checkbox"/> f. Loan insurance	2. Status of Federal Action: <input type="checkbox"/> a. Bid/offer/application <input type="checkbox"/> b. Initial award <input type="checkbox"/> c. Post-award	3. Report Type: <input type="checkbox"/> a. Initial filing <input type="checkbox"/> b. Material change For Material Change Only: year _____ quarter date of last report
4. Name and Address of Reporting Entity: <input type="checkbox"/> Prime <input type="checkbox"/> Subawardee Tier _____, if known: Congressional District, if known:	5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime: Congressional District, if known:	
6. Federal Department/Agency:	7. Federal Program Name/Description: CFDA Number if applicable:	
8. Federal Action Number, if known:	9. Award Amount, if known:	
10. a. Name and address of Lobbying Entity (if individual, last name, first name, MI):	b. Individuals Performing Services (including address if different from No. 10a) (last name, first name, MI): (attach Continuation Sheet(s) SF-LLL-A, if necessary)	
11. Amount of Payment (check all that apply): \$ _____ <input type="checkbox"/> actual <input type="checkbox"/> planned	13. Type of Payment (check all that apply): <input type="checkbox"/> a. retainer <input type="checkbox"/> b. one-time fee <input type="checkbox"/> c. commission <input type="checkbox"/> d. contingent fee <input type="checkbox"/> e. deferred <input type="checkbox"/> f. other; specify:	
12. Form of Payment (check all that apply): <input type="checkbox"/> a. cash <input type="checkbox"/> b. in-kind; specify: nature _____ value _____		
14. Brief Description of Services Performed or to be Performed and Date(s) of service, including officer(s), employee(s), or Members contacted, for Payment Indicated in Item 11: (attach Continuation Sheet(s) SF-LLL-A, if necessary)		
15. Continuation Sheet(s) SF-LLL-A attached: <input type="checkbox"/> Yes <input type="checkbox"/> No		
16. Information requested through this form is authorized by 31 U.S.C. §1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. §1352. This information will be reported to the Congress semiannually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000.00 and not more than \$100,000.00 for each such failure.		Signature: Print Name: Title: Telephone No.: _____ Date:
Federal Use Only:		Authorized for Local Reproduction Standard Form-LLL

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal Action, or a material change to a previous filing, pursuant to the 31 U.S.C. §1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Use the SF-LLL-A Continuation Sheet for additional information if the space on the form is inadequate. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is an/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, state and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or sub award recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and Contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee", then enter the full name, address, city, state and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loan, and loan commitments.
8. Enter the most appropriate Federal Identifying number available for the Federal action identified in Item 1 (e.g., Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the Contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
 - a. Enter the full name, address, city, state and zip code of the lobbying entity engaged by the reporting entity identified in item 4 to influence the covered Federal action.
 - b. Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name, and Middle Initial (MI).
10. Enter the amount of compensation paid or reasonably expected to be paid by the reporting entity (item 4) to the lobbying entity (Item 10). Indicate whether the payment has been made (actual) or will be made (pledged). Check all boxes that apply. If this is a material change report, enter the cumulated amount of payment made or planned to be made.
11. Check the appropriate box(es). Check all boxes that apply. If payment is made through an in-kind contribution, specify the nature and value of the in-kind payment.
12. Check the appropriate box(es) that apply. If other, specify nature.
13. Provide a specific and detailed description of the services that the lobbyist has performed, or will be expected to perform, and the date(s) of any services rendered. Include all preparatory and related activity, not just time spent in actual contact with Federal officials. Identify the Federal official(s) or employee(s) contacted or the officer(s), employee(s), or Member(s) of Congress that were contacted.
14. Check whether or not a SF-LLL-A Continuation Sheet(s) is attached.
15. The certifying officer shall sign and date the form, print his/her name, title, and telephone number.

Public reporting burden for this collection of information is estimated to average thirty (30) minutes per response including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

Send comments regarding the burden estimate or any aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046),
Washington, D.C. 20503.

H. CONFLICT OF INTEREST

Except as may be identified and explained below, the undersigned hereby certifies that, no member of the Charlotte City Council, Mecklenburg Board of County Commissioners, Metropolitan Transit Commission, officer, employee, or former employee of the City, AND

no elected, appointed, or employed official or employee of the State of North Carolina or of a governing body, instrumentality, or political subdivision within the territory comprising Mecklenburg County, AND

no relative of persons described above, AND

no member of or delegate to the Congress of the United States

has an interest whatsoever (regardless of how indirect and how remote that interest may be) in the Bidder's organization and/or in the proceeds of any contract and/or agreement which might be made between the Bidder and the City as result of the successful bid/proposal accompanied by this certification; no person who is or who during the past twelve (12) months has been a member of the Charlotte City Council, Mecklenburg Board of County Commissioners, Metropolitan Transit Commission, an officer or employee of the City is employed by or on behalf of the Bidder's organization; and that until acceptance of all work or services to be performed under any resulting contract or agreement, the Bidder shall not enter into any contract involving services or property, whether or not related to the performance of any resulting contract or agreement, with any of the aforementioned persons or with any business in which any such person has an interest, direct or indirect.

Except as identified and explained below and with City's prior approval the Bidder shall not engage in any activity, or accept any employment, interest or contribution that would create an appearance of a conflict of interest (personal or organizational) or reasonably appear to compromise the Bidder's judgment with respect to all work or services to be performed under any resulting contract or agreement.

The undersigned certifies that he is legally authorized by the Bidder to make the above representation, and that the representation is true to the best of his knowledge and belief and without deliberate omission of any inquiry which would to the best of his belief tend to change the above representation. The undersigned understands that any representation made knowing it to be false may be cause to disqualify the Bidder from competing for award for the contract at hand, may be cause to terminate the resulting contract and disqualify the Bidder from being awarded future contracts by the City.

The Bidder certifies that neither he nor any agent, representative, or other party acting on his behalf has offered or given any gratuity or gratuities, in the form of gifts, entertainment, or otherwise, to any director, officer, or employee of the City or of any person, firm, consultant or contractor retained by the City, with a view to securing the contract or of securing favorable treatment with respect to the award hereof, and the Bidder further certifies that neither he nor any agent, representative, or other party acting on his behalf will offer or give any such gratuity to any director, officer, or employee of the City or of any such consultant or contractor with a view to securing favorable treatment with respect to any change or amendment to the contract, or to any other action with respect to the performance hereof.

The Bidder further understands that in addition to submitting this certification at the time of bid/proposal submission to the City, the Bidder shall also be required to submit a similar certification at the time of execution of any resulting contract.

NOTE: THIS CERTIFICATION MUST BE SIGNED AND SUBMITTED WITH THE BID/PROPOSAL

Signature: _____
Title: _____ Date of Signing: _____
Firm or Corporate Name: _____
Address: _____

Telephone Number: _____

I. SYNOPSIS QUESTIONS

Please answer succinctly:

1. What is the title of your project? FFY23_FY26 Funding Year 5310 Grant
2. Identify the amount of money needed and how it will be used. Union County Transportation (UCT) requests \$400,000 from the 5310 grant. Lack of transportation in Union County is the leading cause of Seniors not getting the medical attention they need. 5310 funding is helping seniors get to medical appointments, the grocery store, and locations where they remain active in their community.
3. What is the deliverable? With minimal transportation in the County, we are the only way most seniors get to their destinations. Since receiving 5310 funds in 2016, we have completed 69,749 trips using this funding. We have exhausted 5310 funding in the past years before the fiscal year's end, causing us to move 5310 passengers to another funding source.
4. How will you be able to sustain the project/acquisition from #2 going forward? Union County Transportation will sustain the 5310 projects in the future by ensuring all funds are used within the time frame designated. Union County has exhausted all funds awarded from the 5310 grants.
5. Is your request/project scalable? If we receive less than the full amount of the project request, it would be helpful, but with a deficit. The amount requested is to provide needed trips for seniors and disabled passengers. We have increased our fleet to meet the growing transportation demand, which in turn means more trips that can be completed. If the amount granted is less, we will need to scale back the number of trips provided using this funding. Potentially, new service requests may be delayed for the new client registrations; with the addition of 5310 funding, a wait list is no longer needed.
6. If you receive less than the full amount of your project request, will the funding be useful? How would the project change with less funding? If we receive less than the full amount of the project request, it would be helpful, but with a deficit. The amount requested is to provide needed trips for seniors and disabled passengers. If the amount granted is less, we will scale back the number of trips provided using this funding. Potentially, new service requests may be delayed for new client registration. With the addition of 5310 funding, a waiting list is no longer needed.
7. Provide a list of Tasks/Deliverables Associated with your proposed timeline
 - Task #1: Determine eligibility and complete registration of those additional persons who call in and can be added.
 - Task #2: Notify any additional passengers of the ability to schedule trips within ten days following completion of eligibility of determination (15 days if waiting for proof of a disability).
 - Task #3: Track trips provided and report quarterly to CATS.
 - Task #4: Prepare invoice and progress report to submit to CATS within five days following the last business day of the quarter.
 - Task #5: Provide 100 or more trips and track trips provided.

J. CHECKLIST FOR SUBMITTING PROPOSAL

Step 1 – Read the document fully

Step 2 Proposal Copies

- 1 Copy signed “Original” and an electronic USB Application to be delivered, to City Procurement Division, Attention Beverly Hovis, 12th Floor, 600 East 4th Street, Charlotte, NC 28202

Step 3 Proposal Format – Proposals should be formatted as follows:

Completed and signed application by date

Section 9, E, Title VI Program Report

- Section 9, G, Lobbying Certification
- Section 9, G, Disclosure Form to Report Lobbying
- Section 9, H, Conflict of Interest
- Section 9, I, Synopsis Questions.

It is the Subrecipient’s responsibility to check the City’s Contract Opportunities Site for any addenda or changes to this Project. Search for 5310 FY23 Call for Projects Grant Application to find any documents or changes have been posted.



Union County, NC

Staff Report

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

File #: 24-847

Agenda Date: 12/16/2024

TITLE:

Contract - Architectural Services for UC Water Operations Center Expansion

INFORMATION CONTACT:

Christopher J. Boyd, Facilities and Fleet Management, Director, 704-283-3868

ACTION REQUESTED:

Authorize 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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This request is to approve a contract with Progressive Architecture Engineering, P.C. to complete the building and site design for the new UC Water Operations Center Expansion and Renovation project. The scope of work will include the design of a building addition, or stand-alone building, of approximately 30,000 gsf and renovate close to 3,000 gsf of space in the existing Operations Center.

The designer will be responsible for verification of the previously conducted space needs analysis, development of the building program requirements, full architectural and engineering design and construction administration. The designer will also be tasked with coordination and teaming with the Construction Manager at Risk to be selected by the County.

The Facilities and Fleet Management Department partnered with the Procurement Department to issue Request for Qualifications No. 2025-005, Architectural Services, Union County Water Operations Center Expansion and Renovation Project. On September 10, 2024, eleven (11) qualifications packages were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. The top four (4) firms were invited to shortlist interview/presentations. As a result, the team requests approval to enter into a contract with Progressive Architecture Engineering, P.C. Staff recommends the Board approve the contract with Progressive Architecture Engineering, P.C. the amount of \$870,260.00 to complete the building design and construction administration.

FINANCIAL IMPACT:

The cost of this contract is \$870,260.00. There are sufficient funds in the UC Water Ops Center Expansion capital account, 60186019, to cover this expense.



November 26, 2024

Cheryl Wright
Procurement and Contract Management Director
Union County
500 North Main Street
Monroe, NC 28112

Re: Proposal for Professional Architectural and Engineering Services for the Union County
Water Operations Center Expansion and Renovation

Dear Cheryl,

Progressive Architecture Engineering, P.C. is honored to have this opportunity to work with the team at Union County on this project and is pleased to present this proposal for architectural and engineering services for the Union County Water Operations Center located at 4600 Goldmine Road, Monroe, NC. The following is our understanding of the project, our scope of services, clarifications, proposed schedule, and compensation for your consideration.

UNDERSTANDING OF PROJECT

The project, as we understand it, for the Union County Water Operations Center and is an expansion of the current Water Operation Center. The project is intended to satisfy Union County Water current space deficits, provide easy access to customers for payments and other services, and relocate other Union County Water staff and departments to improve operations and services. The project will be on the premises of the current Water Operations Center with the anticipated building size to be 30,000 square feet and will contain general offices for administration, engineering, operations, customer service including a drive-thru, and warehouse space. The project will also include the renovation of approximately 3,000 square feet of existing operations space. The delivery of the project will be in coordination with a selected Construction Manager at Risk partner with a separate and early civil and foundation permit set and then followed by the building permit set. There is potential for a PEMB permit set if the project utilizes this type of construction – TBD.

Progressive Architecture Engineering, P.C. will work directly with the selected Construction Manager at Risk partner to be selected by Union County based on a separate RFQ process with an award anticipated by mid-February 2025. Progressive Architecture Engineering, P.C. understands the CM at Risk's responsibilities to manage overall construction schedule and budget, provide pricing at the end of each design phase (schematic design, design development, and construction documents), manage the sub-contractor bidding process, and coordination and normalization of bids. The construction type of the new building, pre-engineered metal building versus traditional steel structure, shall be determined based on cost and availability of materials.

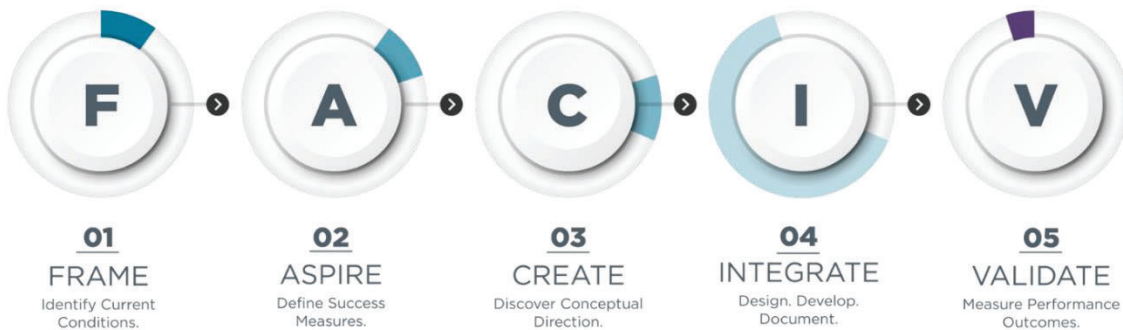
Progressive Architecture Engineering, P.C. will manage all structural, mechanical, plumbing, and electrical engineering from our in-house engineering practice. Timmons Group, as contracted under Progressive Architecture Engineering, P.C., will provide all civil engineering and permitting efforts including site survey, retention pond design, and general civil engineering scope.

Union County shall provide to the project as third-party services the geotechnical engineering report (to be managed by Progressive Architecture Engineering, P.C.), IT and AV infrastructure and cabling services (Progressive Architecture Engineering, P.C. to coordinate with selected vendors – providing

power and data locations on power/equipment plans), security design (cameras and door access controls) and installation, and construction field testing as required. Union County will also provide existing building drawings as related to the new scope of the project, existing site civil drawings, and retention pond drawings and calculations. Progressive Architecture Engineering, P.C. shall be able to rely on the accuracy of information provided by Union County and its associated consultants and vendors.

SCOPE OF BASIC SERVICES

Based upon the above project understanding, we will provide the following scope of services utilizing our proprietary Performance Based Design (PBD) framework for ensuring meaningful and measurable outcomes specifically relevant to your organization.



This approach focuses the early weeks of the project on identifying current conditions, defining success measures, and discovering conceptual direction that results in an aligned project approach specifically established to meet your unique needs. This discovery stage ensures that your investment is focused only on what is beneficial for your organization.

We understand the Union County Water Operations Center will be a key asset to improve operations and services. We approach our work with you with curiosity and objectivity to build insight and recommendations for an ideal future state. Through an understanding of where you are today and where you want to be tomorrow, we can align our solutions to support your organizational strategy.

FRAME – Understanding Current State

The foundation of our process is derived from a thorough understanding of an organization’s current condition, strategy, and business objectives. We believe it is an essential reference when defining future opportunities.

Due Diligence: plans and document collection from Union County

- Existing program document
- Civil As-Builts including all retention ponds
- Site Survey – existing
- Geotech Investigation (Progressive Architecture Engineering, P.C. to manage this process)
- Schedule review meetings with Union County Code Review

Due Diligence: Progressive Architecture Engineering, P.C.

- Site Survey – Timmons Group to conduct new site survey(s)
- Code Research – building and zoning
- Permitting research and timelines
- Filed verify existing space to be renovated – create Revit file

Project kick-off meeting with key stakeholders. Walk everyone through the FAC process and overall Project Schedule.

Learning Session Walk-Thru: Existing Site(s), Existing Building(s), Site(s) Observation

- Walk existing downtown facility

- Walk future site / campus
- Organizational why behind project and occupancies on site.
- Walk space to be renovated

User Survey / Space need analysis

- Progressive Architecture Engineering, P.C. internally generate survey(s) based on walk-thru notes
- Distribute surveys to departments / stakeholders
- Collect results, formulate follow up questions

Follow Up Interviews

- Schedule and perform interviews with departments / stakeholders based on survey results

ASPIRE – Identifying Future State

We engage stakeholders to imagine unique organizational and project specific principles that will determine success for the project.

- Establishing what success looks like for the Union County Water Operations Center
- Confirm and prioritize project elements and organizational goals with a focus on operations and services
- Target new and/or enhanced programs desired for success
- Determine outstanding organizational and facility needs
- Discuss organizational positioning and related partnerships

Work Session 1: with facilities and department heads

- Review existing program document
- Post-it note activity (reduce enhance eliminate create)
- “Priority” exercise

Progressive Architecture Engineering, P.C. internally establish Design Principles

Work Session 2: with facilities

- Present design principles to County Stakeholders for approval
- Review new program document
- Brainstorm on what they want customer experience to be like
- Visual benchmarking (site, exterior, and interior)

Deliverables: Survey/Interview results, revised program document, visual benchmarking document with notes, design principles

CREATE – Designing the Conceptual Direction

We challenge assumptions and encourage dreaming to explore purposeful solutions. The aspirational based principles identified in the previous phase are embodied in our work and serve as a foundation for value judgements and design decisions.

- Gain alignment on design principles
- Conceptualize all systems
- Create conceptual design options for the project
- Select and develop a design concept

Work Session #1 (internal with Timmons Group and CM at Risk)

- Iterate on site layout design – explore alternate site locations. (2-3 schemes)
- Interior blocking plans (2-3 schemes)
- Meeting with CM to discuss construction type

Presentation #1 (stakeholders + CM at Risk)

- Present design principles to County Stakeholders for approval
- Present site layout schemes to stakeholders
- Present interior blocking plans
- Selections / feedback

Work Session #2 (internal Progressive Architecture Engineering, P.C.)

- Site refinement
- Interior blocking plan refinement into single concept plan
- Architectural concepts (2-3 schemes) based on concept plan
- Establish potential risk items list with CM at Risk

Presentation #2 (stakeholders + CM at Risk)

- Site plan
- Floor plan
- Architectural concepts
- Selection on architectural / feedback

Final Refinements. Touchbase with CM at Risk – to provide rough order of magnitude pricing to check against budget

Presentation #3 (stakeholders)

- Approve direction for site, floor plan, and architectural design

Deliverables: Updated/proposed site design concept, Interior Blocking Plan, Elevations

INTEGRATE – Design and Construction Documentation

Based on the approved design direction produced in the Frame/Aspire/Create phases, we will produce a schematic design package illustrating all building systems suitable to develop a conceptual project budget. We are committed to aligning the design with the client vision, function, aesthetics, and performance expectations for the project. Anticipated project phases include:

Schematic Design:

The completed schematic design package will outline the design intent for all aspects of the proposed Water Operations Center site, site enhancements, and primary utilities. Union County's approval is required to move into the next phase.

Includes:

- Development of Architectural and Engineering plans and details based on approved conceptual package
- Coordinate with Owner's outside consultants and partners
- Provide progress documents to Owner and CM at Risk contractor for pricing, assistance with pricing questions, and clarification of scope
- One (1) meeting to review construction documents with Union County's Leadership Team
- One (1) revision per Owner comments

Deliverables:

- Revised Plans, including Site and Interior Floor Plans, and Elevations
- Preliminary Furniture Plan Layout
- Approved Schematic Design documents

Design Development:

Based on approved Schematic Design Phase documents, Progressive Architecture Engineering, P.C. will revise the plans, prepare sections, elevations, and/or sketches indicating design intent of

key project features and produce progress drawings, including the following to be used to update and confirm the project budget.

Includes:

- Development of Architectural and Engineering plans and details
- Outline Specifications
- Coordinate with Owner's outside consultants and partners
- Provide progress documents to Owner and CM at Risk contractor for pricing, assistance with pricing questions, and clarification of scope
- One (1) meeting to review construction documents with Union County's Leadership Team
- One (1) revision per Owner comments

Deliverables:

- Revised Plans, including Site and Interior Floor Plans, and Elevations.
- Furniture Plan Layout
- Approved Design Development documents

Furniture, Fixtures and Equipment (FFE) Management:

- Progressive Architecture Engineering, P.C. will prepare purchasing packages consisting of furniture and fixture plans, schedule, and specifications for delivery to Union County purchasing department. Progressive Architecture Engineering, P.C. will evaluate substitution requests by invited bidders for parity to specified furniture. Union County will engage the approved/selected furniture and fixture vendors.
- Furniture Management: Progressive Architecture Engineering, P.C. will evaluate the detailed furniture plans and furniture order as prepared by the selected furniture vendor(s) and will coordinate with the vendor as required to finalize furniture plans and furniture order. Progressive Architecture Engineering, P.C. will coordinate finishes with the furniture vendor, review final order, and issue to Union County for signature. Union County will review, sign off, and purchase furniture. Reviewing changes made after the order is processed will be handled with a change order and treated as additional service. Progressive Architecture Engineering, P.C. shall aid Union County to review and inspect FFE upon delivery and after installation as part of Punch List process.
- Interior Graphics Package and Contract Administration: Progressive Architecture Engineering, P.C. will work with the Union County brand guide to develop messaging and content for interior graphics, produce graphic plan and elevations for Union County review and approval, and coordinate and review graphic design package as supplied by the Union County approved vendor. Progressive Architecture Engineering, P.C. will present the conceptual graphics package identified above for review, review final graphics order, and issue to Union County for signature. Progressive Architecture Engineering, P.C. will review shop drawings (two reviews are included) by the graphics vendor and ensure the design intent and requirements are met.

The cost for procurement of FF&E items from the Union County designated furniture and signage vendors will be direct to Union County. Based on our discussions, we understand the FF&E package will be bid and procured using the State of NC product program. We have assumed the selected vendor will catalogue and coordinate any existing FF&E items to be reused.

Construction Documents:

Based on the approved Design Development drawings, Progressive Architecture Engineering, P.C. will develop architectural plans, elevations, sections, and large-scale details and specifications as required for CM at Risk pricing, construction, and permitting. We will review the construction document set at 90% completion for approval by Owner stakeholders. Includes Mechanical, Electrical, Plumbing/Fire Protection, Structural, Civil Engineering Services.

Includes:

- One (1) meeting to review construction documents at 90% completion with Owner
- One (1) revision per Owner comments

Deliverables:

Architectural:

- Architectural Plans to include the following: plans, details, sections, general notes and legends, partition plan(s), reflected ceiling plan(s), finish plan(s)
- Elevations, details, and specifications as required to build the project
- Full Specifications

Mechanical, Electrical, Plumbing/Fire Protection Engineering:

- Plumbing/Fire Protection floor plan, details, notes, and legends
- Electrical power and tele/data box location plan, and lighting plan
- Electrical one-line diagram, panel schedules, details, notes, and legends

Structural Engineering:

- Structural plans, details, notes, and legends

Civil Engineering:

- Civil site plan, details, notes, and legends

Architectural and Engineering services will result in drawings sufficient for permit. The Owner and the Architect agree that the CM at Risk will be responsible for some interpretation of the drawings to result in a finished building. Construction cost will be determined by bids received by the CM at Risk and the Owner from selected sub-contractors.

Permitting and Bidding

Progressive Architecture Engineering, P.C. will prepare permit applications and submit a construction document package to the Union County building inspection department for review and comments for permitting. We will respond to comments and make minor drawing revisions as required by the code enforcement review. The delivery of the project will be in coordination with a selected Construction Manager at Risk partner with a separate and early civil and foundation permit set and then followed by the Building permit set. There is potential for a PEMB permit set if the project utilizes this type of construction – TBD.

Deliverables:

- Prepare permit applications and submit drawing package as required for permitting
- Make minor drawing revisions as required by the code enforcement review.
- Provide assistance to selected CM at Risk during sub-contractor bidding process
 - a. Respond to reasonable RFI requests and document clarifications

Construction Administration

During construction, Progressive Architecture Engineering, P.C. will include the following:

Includes:

- Attend preconstruction meeting
- Twenty-four (24) bi-weekly coordination conference calls
- Monthly site visits or as required to observe work and prepare a Field Report for each visit
- Review submittals that we request in order to confirm design intent – up to two (2) reviews are included
- Respond to CM at Risk's RFIs for clarifications to the construction drawings as needed

- Site visit to review the CM at Risk's Punch List and prepare documentation for substantial completion. This will be one (1) person from each discipline: architectural, interiors, structural, mechanical/plumbing, and electrical – total of five (5) person visit.
- Conduct one (1) final inspection of CM at Risk's completed work. Following receipt of contractor's punch list, issue written punch list of items that do not comply with contract documents and that need correction by the contractor.

Deliverables:

- Provide construction submittal reviews and approvals for architectural and engineering disciplines.
- Respond to reasonable CM at Risk's requests for document clarification and interpretation by architectural and engineering disciplines. These will be limited to industry standard review of RFIs and responses.
- Prepare and administer Change Orders as required.
- Review and certify monthly Construction Pay Applications submitted by the CM at Risk.
- Provide As-Built set of documents including all documented revisions and RFIs from the Construction Administration Phase. Progressive Architecture Engineering, P.C. will work with CM at Risk to include all As-Built conditions as they occur throughout the construction process.
- Observe start-up of all major systems, including mechanical, electrical, fire protection and other similar systems.
- Review and process close-out documentation received from the CM at Risk.

VALIDATE – Post occupancy 10-month walk-thru and business goal measurements.

After project occupancy, we verify that design measures have been met or exceeded. We then celebrate project success and its ability to fuel innovation and growth.

CLARIFICATIONS

Basic Service fees noted below **do not include** the following:

1. Geotechnical evaluation and reports.
2. Any scope associated with LEED analysis, documentation, and administration.
3. Design and permitting of a pre-engineered metal building.
4. Drawings required for permit and / or placement/installation of temporary site trailers.
5. Any audio / visual or acoustical consultant fees or specialized audio / visual design.
6. Design of low voltage electrical systems (voice, data, and security). Design of conduit sizes and routing to accommodate the same is included and will be coordinated with Union County's requirements.
7. Bidding phase services beyond basic clarification and answers to qualified bidder questions (i.e., invitation to bid documentation, contractor bid analysis, and selection).
8. Preparation of construction as-built drawings. Progressive Architecture Engineering, P.C. will provide As-Designed Drawings: drawings at the end of the project which will include all revisions due to RFIs, field conditions, or otherwise that have been incorporated into the drawings during construction.

SCHEDULE

We anticipate that work will begin mid-January 2025 with written authorization to proceed, allowing assembly of team and resources. See attached DRAFT Project Schedule to be confirmed with selected CM at Risk and Union County milestone dates.

PROFESSIONAL COMPENSATION

Based upon the above identified scope of services, Progressive Architecture Engineering, P.C. proposes the following compensation for professional services for a stipulated sum of \$865,260 (eight hundred sixty-five thousand two hundred sixty dollars). Reimbursable expenses are in addition to the professional

compensation, estimated at \$5,000 (five thousand dollars) and will be invoiced according to the attached Schedule of Invoice Rates.

Frame, Aspire, Create	\$88,830
Integrate	
Schematic Design	\$131,440
Design Development	\$155,590
FFE Management	\$48,900
Construction Documents	\$168,320
Permitting and Bidding	\$17,300
Construction Administration	\$156,280
Civil Engineering	
Site Survey	\$10,100
Retention Pond Design	\$8,000
Civil Design and Documentation	\$57,375
Civil Construction Administration	\$18,125
Validate	<u>\$5,000</u>
Total Compensation:	\$865,260

Progressive Architecture Engineering, P.C. has prepared this proposal for Union County, and we request that it be treated as confidential and not copied or distributed for any reason other than evaluation for hire.

The attached Standard Agreement Provisions are incorporated into and made part of this proposal. It is understood that a modified AIA contract (B101-2017) will be executed between the parties based on the standard contract documents used by Union County. If this proposal meets with your approval, please sign below and return a copy of the signed proposal. Your signature will be our authorization to begin the work and place the project in the firm's schedule. If you do not sign and return this proposal, and after receipt of this proposal you request or accept services from Progressive Architecture Engineering, P.C. in connection with this or any other engagement, your request or acceptance of such services will be deemed to be an acquiescence or agreement with the terms provided in this proposal.

We look forward to working on this project with you and your team.

Sincerely,

Donald Green

Digitally signed by Donald Green
DN: C=US,
E=dgreen@weareprogressive.com,
O=Progressive Companies,
CN=Donald Green
Date: 2024.11.27 10:48:27-05'00'

Donald K. Green, AIA, NCARB, LEED AP BD+C
Senior Project Manager

G. Wesley Jones

Digitally signed by G. Wesley Jones
DN: E=jonesw@progressiveae.com, CN=G.
Wesley Jones, O="Progressive AE, Inc.",
L=Grand Rapids, S=MI,
SERIALNUMBER=MAS20241024812928,
C=US
Reason: I agree to the terms defined by the
placement of my signature on this document
Date: 2024.11.27 12:33:39-05'00'

G Wes Jones, LEED AP BD+C
Principal

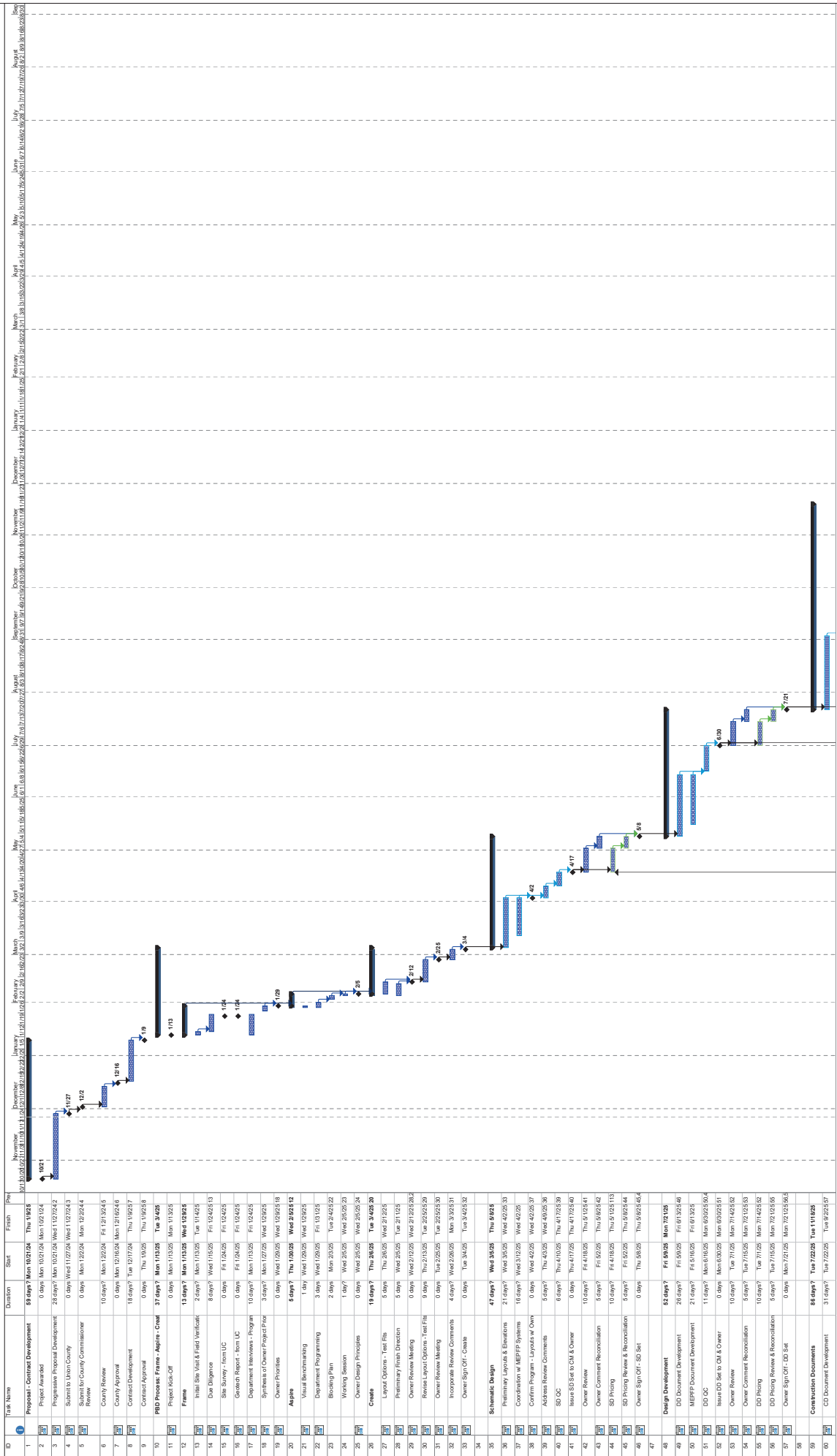
Accepted By: _____

Printed Name: _____ Date: _____

Union County

DG/pny
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UNION COUNTY WATER OPERATIONS CENTER



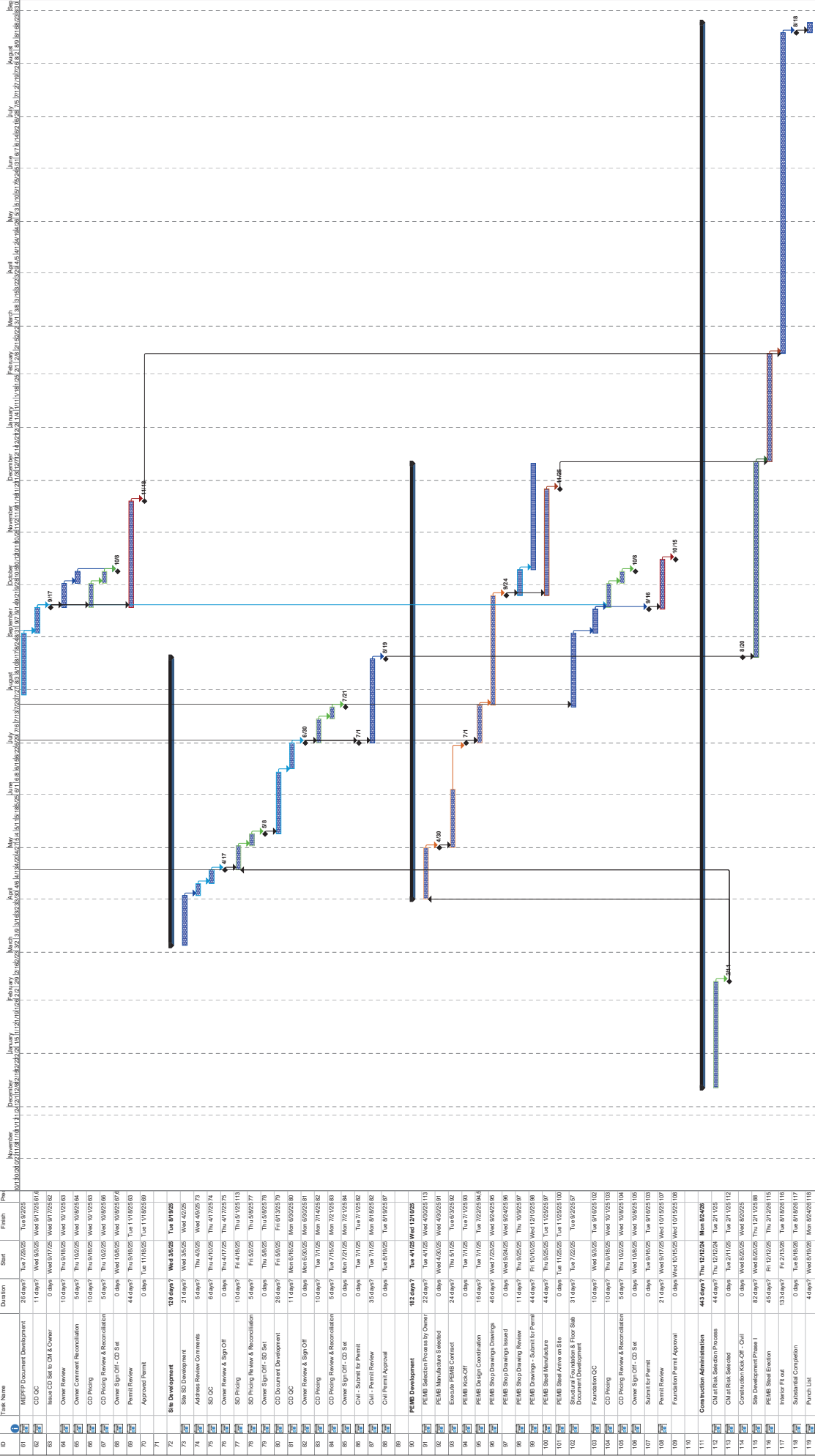
Task Name | Duration | Start | Finish | Milestone

Project 12-1005 MS Project | Date: Tue 11/26/24

Legend:

- External Milestone
- Inactive Milestone
- External Task
- Inactive Task
- Manual Task
- Manual Summary
- Manual Summary/Setup
- Duration-only
- Priority
- External Task
- External Milestone
- Progress
- Deadline

UNION COUNTY WATER OPERATIONS CENTER



Project: 12-1035 MS Project
Date: Tue 11/20/24

Legend:

- █ External Milestone
- █ Inactive Milestone
- █ Inactive Task
- █ Inactive Summary
- █ Duration-only
- █ Manual Summary
- █ Manual Summary/Setup
- █ Manual Summary
- █ Priority
- █ External Task
- █ External Milestone
- █ Progress
- █ External Milestone
- █ Deadline

Page 2

Standard Agreement Provisions
Architectural Services

The parties to this Agreement, Progressive Architecture Engineering, P.C., Charlotte, North Carolina, USA, hereinafter called the ARCHITECT and Union County, Monroe, North Carolina, USA, hereinafter called the OWNER, hereby agree to the following conditions:

1. Scope of Services: The services provided by the ARCHITECT shall be limited to those described in the proposal dated November 26, 2024. The parties agree that the Standard Agreement Provisions incorporated herein shall govern.
2. Term: If services covered by this Agreement have not been completed within fourteen months of the date of this Agreement, through no fault of the ARCHITECT, extension of the ARCHITECT's services beyond that time shall be compensated as additional services.
3. Changed Conditions: If, during the term of this Agreement, the ARCHITECT becomes aware of any circumstances or conditions that were not originally contemplated by or known to the ARCHITECT, then to the extent that they affect the scope of services, compensations, schedule, allocation of risks or other material terms of this Agreement, the ARCHITECT may call for re-negotiation of appropriate portions of the Agreement. The ARCHITECT shall notify the OWNER of the changed conditions necessitating re-negotiation, and the ARCHITECT and the OWNER shall promptly and in good faith enter into re-negotiation of this Agreement to address the changed conditions. If terms cannot be agreed to, the parties agree that either party has the absolute right to terminate this Agreement.
4. Additional Services: Additional services not specifically identified in the Scope of Services shall be paid for by the OWNER in addition to the fees previously stated, provided the OWNER authorizes such additional services in writing. Special services will be billed monthly as work progresses and invoices are due upon receipt.
5. Standard of Care: Professional Services provided by the ARCHITECT will be conducted in a manner consistent with that level of care ordinarily and normally exercised by licensed architects and engineers practicing in the State where the Project resides. In reference to the Standard of Care, the Owner and Architect acknowledge that changes may be required because of possible errors, omissions, ambiguities or inconsistencies in the plans and specifications, and, therefore, that the costs of the project may exceed the construction contract sum. The Owner and Architect agree that a design contingency in the amount of three percent (3 percent) of the cost of the work be established, as required, to pay for any such increased project costs. The Owner further agrees to make no claim by way of direct or third-party action against the Architect or his or her subconsultants with respect to any payments within the limit of the contingency reserve made to the construction contractors because of such changes or because of any claims made by the construction contractors relating to such changes. Costs or expenses that are considered value added/betterment (see Paragraph 29) to the project shall not be applied against the design contingency. The design contingency shall be established as a line item in the overall project budget and be carried through the project's construction phase.
6. Schedule for Rendering Services: The ARCHITECT shall prepare and submit for OWNER approval a schedule for the performance of the ARCHITECT's services. This schedule shall include reasonable allowances for review and approval times required by the OWNER, performance of services by the OWNER's consultants, and review and approval times required by public authorities having jurisdiction over the project. This schedule shall be equitably adjusted as the project progresses, allowing for changes in scope, character or size of the project requested by the OWNER, or for delays or other causes beyond the ARCHITECT's reasonable control.
7. Payment Terms: Invoices will be submitted by the ARCHITECT monthly, are due upon presentation and shall be considered past due if not paid within thirty (30) calendar days of the date of invoice. Invoices past due shall accrue interest at one percent (1%) per month from the

original invoice date. If past due invoices cause the ARCHITECT to proceed with legal action or collection services, the OWNER agrees to pay all of the ARCHITECT's collection expenses including reasonable attorney fees.

8. Opinions of Probable Construction Cost: In providing opinions of probable construction cost, the OWNER understands that the ARCHITECT has no control over the cost or availability of labor, equipment, or materials, or over market conditions or the Contractor's method of pricing, and that the ARCHITECT's opinions of probable construction costs are made on the basis of the ARCHITECT's professional judgment and experience. The ARCHITECT makes no warranty, express or implied that the bids or the negotiated cost of the Work will not vary from the ARCHITECT's opinion of probable construction cost.

9. Ownership of Instruments of Service: The OWNER acknowledges the ARCHITECT's design documents, including electronic files, reports, drawings, worksheets, plans, supporting documents and other material as the ARCHITECT's instruments of professional service. Provided that the OWNER complies with all obligations of this Agreement and, upon completion of the services and payment in full of all monies due to the ARCHITECT, the ARCHITECT shall provide the OWNER with an exclusive agreement to use the final construction documents prepared under this Agreement for construction or maintaining the project. The OWNER shall not reuse or make any modifications to the construction documents without the prior written authorization of the ARCHITECT. The OWNER agrees, to the fullest extent permitted by law, to defend, indemnify and hold harmless the ARCHITECT, its officers, directors, employees, and subconsultants (collectively, ARCHITECT) against any damages, liabilities or costs, including reasonable lawyers' fees and defense costs, arising from or allegedly arising from or in any way related to or connected with the unauthorized reuse or modification of the construction documents by the OWNER or any person or entity that acquires or obtains the construction documents from or through the OWNER without the written authorization of the ARCHITECT.

Under no circumstances shall the transfer of ownership of the ARCHITECT's drawings, specifications, electronic files, or other instruments of service be deemed a work made for hire, or sale by the ARCHITECT, and the ARCHITECT makes no warranties, either express or implied, of merchantability and fitness for any particular purpose, nor shall such transfer be construed or regarded as any waiver or other relinquishment of the ARCHITECT's copyrights or intellectual property rights including Universal Design innovation strategies, checklists, reports and processes in any of the foregoing, full ownership of which shall remain with ARCHITECT, absent the ARCHITECT's express prior written consent.

Native format software models (NFSM) used in development and/or analysis of the OWNER's power system(s) are considered the intellectual property of the ARCHITECT. The ARCHITECT reserves the right of sole ownership of said NFSM. Sole ownership by the ARCHITECT shall survive termination or expiration of the agreement with the OWNER and shall not be restricted by any constraint.

10. Digital Data/Electronic Media: The ARCHITECT reserves the right to remove all indications of its ownership and/or involvement in the material from each electronic medium not held in its possession. The OWNER may retain copies of the work performed by the ARCHITECT in CAD form. Release of digital data will be by execution of the Architect's digital data licensing Agreement (AIA Document C106-2013 or latest edition). Copies shall be for information and used by the OWNER for the specific purpose for which the ARCHITECT was engaged. Said material shall not be used by the OWNER, or transferred to any other party, for use in other projects, additions to the current project, or any other purpose for which the material was not strictly intended without the ARCHITECT's express written permission. Any unauthorized modification or reuse of the materials shall be at the OWNER's sole risk, and the OWNER agrees to defend, indemnify, and hold the ARCHITECT harmless, from all claims, injuries, damages, losses, expenses, and attorneys' fees arising out of the unauthorized use or

modification of all Project documentation. Under no circumstance shall the transfer of drawings or data or other instruments of service on digital data for use by the Recipient be construed to be as a sale. ARCHITECT makes no warranties, either express or implied or of merchantability or of fitness for a particular purpose. To the extent that the digital data includes building information models (Models), the parties agree to the following terms. (1) The Models are intended for the purpose of communicating design intent only and are not construction documents. (2) The Models may not detect all conflicts or inconsistencies. (3) The Models are not intended for quantity take-offs, cost estimates, fabrication, or dimensional purposes. (4) Information contained in the Models will not be construed to dictate construction means or methods. This will remain the Contractor or Fabricator's responsibility.

11. **Dispute Resolution:** In an effort to resolve any conflict, the duly authorized representatives of each party will meet together in good faith in an attempt to resolve the conflict. If this attempted resolution fails to resolve the claim or dispute, the parties agree that all claims, disputes, and other matters in question between the parties arising out of or relating to this Agreement or breach thereof first shall be submitted for non-binding mediation to any one of the following, as agreed to by the parties: American Arbitration Association, American Intermediation Service, Americord, Dispute Resolution, Inc., Endispute, or Judicate. The parties hereto agree to fully cooperate and participate in good faith to resolve the dispute(s). The cost of mediation shall be shared equally by the parties hereto. Any time expended in mediation shall not be included in calculating the time for filing arbitration.

If mediation fails to resolve the claim or dispute, the matter shall be submitted to arbitration with the American Arbitration Association under the Construction Industry rules, unless the parties agree otherwise or unless a plaintiff not a party hereto institutes litigation in a court of competent jurisdiction and said court takes personal jurisdiction over one of the parties hereto regarding the same subject matter as in dispute between the parties hereto.

No arbitration arising out of or relating to this Agreement shall include, by consolidation, joinder, or in any other manner, any additional person not a party to this Agreement except by written consent of the parties and such consent to arbitration involving an additional person(s) shall not constitute consent to arbitration of any dispute not described therein. This Agreement to arbitrate and any Agreement to arbitrate with an additional person(s) shall be specifically enforceable under the prevailing arbitration law.

The demand for arbitration shall be made within one (1) year of the date the claimant knew or should have known of the existence of the claim, dispute, or other matter but in no event later than 3 years after the date of substantial completion of the project. If the demand for arbitration is not effectuated within such times, the claim, dispute, or other matter shall be forever barred.

The decision rendered by the arbitrators shall be final, and judgment may be entered upon it in accordance with applicable law in any court having jurisdiction thereof. In the event either party makes a claim or brings an arbitration action or lawsuit against the other party for any act arising out of the performance of the services hereunder, and the claimant fails to prove such claim or action, then the claimant shall pay all legal and other costs (including attorneys' fees) incurred by the other party in defense of such claim or action.

12. **Termination:** If the OWNER fails to make payments in accordance with this Agreement, such failure shall be considered substantial nonperformance and cause for termination or, at the ARCHITECT's option, cause for suspension of services. The ARCHITECT shall provide seven days' written notice. If the OWNER or ARCHITECT suspends the Project, the ARCHITECT shall be compensated for services performed prior to notice of suspension. The ARCHITECT's fees for the remaining services and the time schedule shall be equitably adjusted. Either party may terminate this Agreement upon not less than seven days' written notice to the other party for convenience and without cause. If the Agreement is terminated, the ARCHITECT shall be compensated by the OWNER for services performed prior to termination and reimbursable

expenses including costs attributable to termination, including the costs attributable to the ARCHITECT's termination of consultant Agreements.

13. Professional Liability Insurance and Limitation of Liability: The ARCHITECT maintains professional liability insurance as part of its normal business practice. The OWNER agrees to limit the ARCHITECT's liability to the OWNER and to all Construction Contractors and Subcontractors on the project due to the ARCHITECT's negligent acts, errors, or omissions, such that the total aggregate liability of the ARCHITECT to all those named shall not exceed the amount of the ARCHITECT's compensation for the Project.
14. Indemnification: Subject to the limitation in Paragraph 13 above the ARCHITECT agrees, to the fullest extent permitted by law, to indemnify and hold harmless the OWNER, its officers, directors and employees (collectively, OWNER) against all damages, liabilities or costs, including reasonable attorneys' fees and defense cost, to the extent caused by the ARCHITECT's negligent performance of professional services under this Agreement and that of its subconsultants or anyone for whom the ARCHITECT is legally liable.

The OWNER agrees to the fullest extent permitted by law, to indemnify and hold harmless the ARCHITECT, its officers, directors, employees and subconsultants (collectively ARCHITECT) against all damages, liabilities or costs, including reasonable attorneys' fees and defense costs, to the extent caused by the OWNER negligent acts in connection with the Project and the acts of its contractors, subcontractors or consultants or anyone for whom the OWNER is legally liable.

Neither OWNER or ARCHITECT shall be obligated to indemnify the other party in any manner whatsoever for the other party's own negligence or for the negligence of others.

The OWNER and ARCHITECT waive consequential damages for claims, disputes, or other matters in question arising out of or relating to this Agreement. This mutual waiver is applicable, without limitation, to all consequential damages including disruptions to business operations or loss of profits.

15. Delays: The OWNER agrees that the ARCHITECT is not responsible for any damages arising directly or indirectly from any delays for causes beyond the ARCHITECT's control. For purposes of this Agreement, such causes include, but are not limited to, strikes or other labor disputes; severe weather disruptions, epidemics, pandemics, or other natural disasters or acts of God; fires, riots, war or other emergencies; failure of any government agency to act in a timely manner; failure of performance by OWNER or the OWNER's contractors or consultants; or discovery of any hazardous substance or differing site conditions. In addition, if the delays resulting from any such causes increase the cost or time required by the ARCHITECT to perform its services in an orderly and efficient manner, the ARCHITECT shall be entitled to a reasonable adjustment in schedule and compensation.
16. Disputed Invoices: If the OWNER objects to any portion of an invoice, the OWNER shall so notify the ARCHITECT in writing within ten (10) calendar days of receipt of the invoice. The OWNER shall identify in writing the specific cause of the disagreement and the amount in dispute and shall pay that portion of the invoice not in dispute in accordance with other payment terms of this Agreement. Any dispute over invoiced amounts due which cannot be resolved within ten (10) calendar days after presentation of invoice by direct negotiation between the parties shall be resolved within thirty (30) calendar days in accordance with the Dispute Resolution provision of this Agreement. Interest at one percent (1%) per month shall be paid by the OWNER on all disputed invoice amounts that are subsequently resolved in the ARCHITECT's favor and shall be calculated on the unpaid balance from the due date of the invoice.

17. ADA Requirements: The ARCHITECT shall make a reasonable professional effort to interpret applicable ADA requirements as they apply to this project but cannot warrant or guarantee compliance due to the fact it is civil rights legislation and open to many different interpretations.
18. Code Compliance: The ARCHITECT shall put forth reasonable professional efforts to comply with applicable laws, codes, and regulations in effect as of the date of the execution of this Agreement. Design changes made necessary by newly enacted laws, codes and regulations after the date shall entitle the ARCHITECT to a reasonable adjustment in the schedule and additional compensation in accordance with the Additional Services provisions of this Agreement.
19. Buried Utilities: The OWNER will be responsible for furnishing the ARCHITECT information identifying the type of all underground utilities and verifying their specific locations. The ARCHITECT (or their subconsultant) will rely on this information and prepare a plan that shows the locations intended for connections with respect to assumed locations of underground utilities provided by the OWNER. The OWNER will approve of all locations of subsurface penetrations prior to them being made. The OWNER agrees to waive all claims and causes of action against the ARCHITECT for damages to underground improvements. The OWNER further agrees to indemnify and hold the ARCHITECT harmless from any damage, liability, or cost, including reasonable attorney's fees and defense costs for any property damage, injury or economic loss arising or allegedly arising from subsurface penetrations.
20. Condominium Conversion: If the ARCHITECT's services and Construction Documents are intended for the design and construction of residential or commercial rental units, they shall be under the ownership and control of a single, integrated OWNER. In the event the Project is changed to any other purpose or use, including, but not limited to, subdivision into individual units for sale, the ARCHITECT shall have no responsibility, and shall be released from all obligations and liabilities for the Project, and each and every right, license and/or ownership interest of the OWNER of the Construction Documents shall be void. The OWNER shall be expressly prohibited from making any further use of the Construction Documents for any purpose, including, but not limited to, the conversion of the Project to another purpose. Further, the OWNER agrees, to the fullest extent permitted by law, to indemnify, immediately defend, and hold harmless the ARCHITECT, its officers, directors, employees and subconsultants (collectively, ARCHITECT) against all damages, liabilities, or costs, including reasonable attorney's fees and defense costs, arising out of or in any way connected with the services performed under this Agreement.
21. Energy Tax Deduction: The ARCHITECT may wish to pursue an energy tax deduction under Section 179D of the Internal Revenue Code for this Project. Such deductions are available to design firms for projects that reduce overall energy use of a building. If Progressive AE determines that this Project meets the relevant 179D qualification criteria, the OWNER agrees to allocate the tax deduction to Progressive AE by signing an Allocation Acknowledgement form which is required by the IRS to receive the deduction.
22. Evaluation of Work: The ARCHITECT shall have authority to reject work that does not conform to the contract documents; however, the ARCHITECT does not have authority to stop work at any time.
23. Hazardous Materials: The ARCHITECT shall have no responsibility for the discovery, presence, handling, removal, or disposal of, or exposure of persons to, hazardous materials or toxic substances in any form at the Project site. The Owner shall furnish tests, inspections and reports required by law or the Contract Documents, such as structural, mechanical, and chemical tests, tests for air and water pollution, and tests for hazardous materials.

24. Hiring of Personnel: OWNER may not directly hire any employee of the ARCHITECT. OWNER agrees that it shall not, directly, or indirectly solicit any employee of the ARCHITECT from accepting employment with OWNER, affiliate companies, or competitors of ARCHITECT.
25. Means and Methods: The ARCHITECT shall not have control over, charge of, or responsibility for construction means, methods, techniques, sequences, or procedures, or for safety precautions and programs in connection with the work, nor shall the ARCHITECT be responsible for the constructor's failure to perform work in accordance with the contract documents.
26. Site Signage: The ARCHITECT shall be permitted to install exterior signs on the project premises for promotional purposes.
27. Timeliness of Performance: The OWNER and ARCHITECT are aware that many factors outside the Agreement control may affect the ARCHITECT's ability to complete the services to be provide under Agreement. The ARCHITECT will perform these services with reasonable diligence and expediency consistent with sound professional practices.
28. Value-Added/Betterment: If, due to the ARCHITECT's error or omission, any required item or component of the project is omitted from the ARCHITECT's Construction documents, the ARCHITECT shall not be responsible for paying the cost to add such item or components to the extent that such item or component would have otherwise been necessary to the project or otherwise adds value or betterment to the project. In no event will the ARCHITECT be responsible for any cost or expenses that provides value, upgrade, or enrichment of the project.



Schedule of Invoice Rates - 2024

Hourly Staff Charges

Class 10 Personnel:	Director, Principal	\$275/hour
Class 9 Personnel:	Senior Healthcare Planner, Senior Project Leader, Project Principal, Practice Leader, Principal / Team Leader, Senior Construction Leader	\$215/hour
Class 8 Personnel:	Senior Engineer Leader, Senior Project Manager, Senior Planner	\$190/hour
Class 7 Personnel:	Senior Architect, Senior Architectural Designer, Senior Engineer, Senior Scientist, Senior Project Manager, Senior Construction Administrator, Construction Superintendent	\$175/hour
Class 6 Personnel:	Engineer II, Project Manager II, Senior Landscape Architect, Senior Interior Designer, Senior Technician, Senior Lighting Designer, Preconstruction Coordinator/Estimator	\$150/hour
Class 5 Personnel:	Architect II, Engineer I, Architectural Designer II, Engineer I, Landscape Architect II, Project Manager I, Planner	\$130/hour
Class 4 Personnel:	Architect I, Architectural Designer I, Graduate Engineer, Interior Designer II, Technician II, GIS Technician, Construction Project Manager/Superintendent, Planner I, Water Resources Specialist, Executive Assistant	\$110/hour
Class 3 Personnel:	Graduate Architect, Landscape Architect I, Interior Designer I, Technician I, Associate Planner, Field Scientist	\$ 95/hour
Class 2 Personnel:	Graduate Interior Designer, Graduate Landscape Architect, Project Assistant	\$ 80/hour
Class 1 Personnel:	Intern	\$ 60/hour

Reimbursable Expenses

1. Fees for Program, Financial or Procurement Management services when the Owner has engaged a supplier and Architect is subject to a fee.
2. Building permit fees and plan review fees as required by the authorities having jurisdiction over projects at cost plus 10%.
3. Outside services, consultants, travel and lodging at cost plus 10%.
4. Copies, telephone, cell phone voice and data charges and office supplies will be charged through a \$25 per month Misc. Office Expense charge. This charge will not be applied to invoices under \$1,000.
5. CAD black/white plotting at 15¢ per square foot; CAD color plotting at 25¢ per square foot; CAD low density color images at 30¢ each; CAD high density color images at 50¢ each; large-format color plotting at \$9 per square foot. Postage, shipping, and lab tests at cost. Files written to CD will be minimum \$100 per drawing or \$500 maximum. Passenger vehicle mileage on projects at the IRS Standard Rate (currently 67¢ per mile). Lodging, meals, and airfare at cost. Machine rental GPS at \$250 per day. Traffic Counters at \$60 per count. Surveying supplies at 50¢ per stake.
6. Overtime expenses requiring higher than normal rates if authorized by owner.

Notes:

1. Invoices are due upon receipt. Unpaid invoices shall bear interest at a rate of 1 percent per month if not paid within 30 days of the date of the invoice.
2. Special media requests may be at higher rate.
3. Hourly staff charges and expenses subject to change annually.

STD RATE

August 5, 2024

Progressive Architecture Engineering, P.C.
 Progressive Companies | Charlotte, NC | Detroit, MI | Grand Rapids, MI | weareprogressive.com



Union County, NC

Staff Report

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

File #: 24-813

Agenda Date: 12/16/2024

TITLE:

Allocate Additional FTE to Information Technology

INFORMATION CONTACT:

Christopher Liersaph, Information Technology, Assistant Director, 704-292-2520

ACTION REQUESTED:

Authorize an additional 0.46 FTE to create a full-time position in Information Technology.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Currently, the Union County Information Technology Department includes two part-time vacant positions, one as an intern (position 422999 at 0.06 FTE) and the other administrative support (position 421098 at 0.48 FTE). Both positions are helpful to the department's operations but are limited by their part-time status, resulting in inefficiencies and less focus on serving our customers. With the county's expanded dependence on information technology, the department is seeking an additional 0.46 FTE to consolidate the two part-time positions into one full-time IT Systems Specialist position that will provide entry-level technical support. This change will improve the availability of technical support for our growing user base. IT has had an ongoing relationship with South Piedmont Community College and will continue to work with them to feed our remaining internship position and possibly look to SPCC graduates to fill this potential position.

FINANCIAL IMPACT:

No additional funding required. Funding exists in the current FY2025 Information Technology budget.



Union County, NC

Staff Report

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

File #: 24-830

Agenda Date: 12/16/2024

TITLE:

October 2024 NCVTS Motor Vehicle Tax Report

INFORMATION CONTACT:

Vann Harrell, Tax Administration, Tax Administrator, 704-283-3478; Kristen Foxworth, Tax Administration, Deputy Tax Administrator, 704-283-3591

ACTION REQUESTED:

Approve the October 2024 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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.

FINANCIAL IMPACT:

\$6,884.98

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

From: Vann Harrell
Tax Administrator

Date: November 8, 2024

Re: Departmental Monthly Report

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

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

Attachment

VH/JM

**OCTOBER 2024
PERCENTAGE FOR REGULAR TAX**

OCTOBER 31, 2024 REGULAR TAX	2024	2023	2022	2021
BEGINNING CHARGE	237,462,552.18	226,119,601.31	216,943,492.71	208,152,978.28
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES	97,421.09			
NON DISCOVERIES	1,993.36	2,205.42	2,205.42	2,218.57
RELEASES	(249,366.96)	(3,716.90)	(752.50)	(648.97)
TOTAL CHARGE	237,312,599.67	226,118,089.83	216,944,945.63	208,154,547.88
BEGINNING COLLECTIONS	31,098,443.41	225,931,923.72	216,834,850.10	208,071,844.07
COLLECTIONS	10,974,252.95	16,325.08	7,583.80	4,200.18
TOTAL COLLECTIONS	42,072,696.36	225,948,248.80	216,842,433.90	208,076,044.25
BALANCE OUTSTANDING	195,239,903.31	169,841.03	102,511.73	78,503.63
PERCENTAGE OF REGULAR	17.73%	99.92%	99.95%	99.96%
OVERALL CHARGED	237,312,599.67	226,118,089.83	216,944,945.63	208,154,547.88
OVERALL COLLECTED	42,072,696.36	225,948,248.80	216,842,433.90	208,076,044.25
OVERALL PERCENTAGE	17.73%	99.92%	99.95%	99.96%

**OCTOBER 2024
PERCENTAGE FOR REGULAR TAX**

OCTOBER 31, 2024 REGULAR TAX	2020	2019	2018	2017
BEGINNING CHARGE	192,184,591.23	186,541,899.71	180,719,078.58	186,663,147.60
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES				
NON DISCOVERIES	228.00			0.01
RELEASES	(1,033.88)	(1,159.15)	(1,267.14)	
TOTAL CHARGE	192,183,785.35	186,540,740.56	180,717,811.44	186,663,147.61
BEGINNING COLLECTIONS	192,102,074.15	186,437,740.39	180,657,414.76	186,613,396.52
COLLECTIONS	380.26	(146.84)	(1,140.46)	32.70
TOTAL COLLECTIONS	192,102,454.41	186,437,593.55	180,656,274.30	186,613,429.22
BALANCE OUTSTANDING	81,330.94	103,147.01	61,537.14	49,718.39
PERCENTAGE OF REGULAR	99.96%	99.94%	99.97%	99.97%
OVERALL CHARGED	192,183,785.35	186,540,740.56	180,717,811.44	186,663,147.61
OVERALL COLLECTED	192,102,454.41	186,437,593.55	180,656,274.30	186,613,429.22
OVERALL PERCENTAGE	99.96%	99.94%	99.97%	99.97%

**OCTOBER 2024
PERCENTAGE FOR REGULAR TAX**

OCTOBER 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	176,818,112.01	174,171,587.92
COLLECTIONS	59.22	16.62
TOTAL COLLECTIONS	176,818,171.23	174,171,604.54
BALANCE OUTSTANDING	41,433.14	22,030.66
PERCENTAGE OF REGULAR	99.98%	99.99%
OVERALL CHARGED	176,859,604.37	174,193,635.20
OVERALL COLLECTED	176,818,171.23	174,171,604.54
OVERALL PERCENTAGE	99.98%	99.99%



Union County, NC

Staff Report

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

File #: 24-825

Agenda Date: 12/16/2024

TITLE:

Budget Amendment - County Manager's Office

INFORMATION CONTACT:

Megan Parks, County Manager's Office, Director Strategy & Innovation, 704-283-2578

ACTION REQUESTED:

Adopt Budget Amendment #6.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Strategy & Innovation team within the County Manager's office is comprised of staff who were reclassified from other County Departments including Human Services (4 staff members) and the Budget Office (1 staff member). This budget amendment will move the salaries and benefits of those staff to the County Manager's Office budget.

FINANCIAL IMPACT:

There is no financial impact as funds are being transferred from one County Department to another.

BUDGET AMENDMENT

BUDGET General Fund
FISCAL YEAR FY 2025

REQUESTED BY Blake Hart
DATE December 16, 2024

INCREASE

DECREASE

Table with columns: Description, Amount. Rows include Employee Compensation (303,872) and Employee Benefits (151,273).

Table with columns: Description, Amount. Rows include Employee Compensation (303,872) and Employee Benefits (151,273).

Explanation: Transfer funds for Strategy & Innovation team from existing departments to County Manager's office

DATE

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

FOR POSTING PURPOSES ONLY

DEBIT

CREDIT

Table with columns: Code, Account, Amount. Lists debit entries for various accounts like Salary - FT, FICA, Retirement Contribution, etc.

Table with columns: Code, Account, Amount. Lists credit entries for various accounts like Salary - FT, FICA, Retirement Contribution, etc.

Total 455,145
Prepared By JP
Posted By
Date

Total 455,145
Number 6



Union County, NC

Staff Report

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

File #: 24-840

Agenda Date: 12/16/2024

TITLE:

Amendment to the Union County Pay and Classification Plan

INFORMATION CONTACT:

Julie Broome, Human Resources, Director, 704-283-3869; Jason Kay, County Attorney, 704-283-3784

ACTION REQUESTED:

Approve revision of the Union County Pay Plan to include new job classification titles, pay grades, and one new position.

- 1) Add the following classification and associated pay grade:
 - a. Environmental Health Division Manager - pay grade Q
 - b. Sheriff's Office Legal Counsel - pay grade S
- 2) Remove the following classification and associated pay grade:
 - a. Director, Environmental Health - pay grade Q
 - b. Training Supervisor - pay grade L
 - c. Trainer - pay grade J
- 3) Add one (1) Assistant County Attorney full-time equivalent (FTE) position

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Updates to the Union County Pay Plan are necessary to add, update, and remove job classification titles to align with current and future organizational needs.

For certain property acquisition and condemnation pre-litigation services related to Union County Water, the County has historically contracted with outside counsel to provide such services. However, due to the volume of this work and time needed to address these issues, bringing these legal services in-house will provide overall benefit to the County and reduce costs. With the addition of one (1) Assistant County Attorney position in the County Attorney's Office, this change will provide improved budget stability, increased efficiency, and strengthened communication and collaboration opportunities. The monetary savings yielded by shifting away from the contract legal services model will fully fund the new position, allow for significantly decreased hourly legal service costs, and increase the County's ability to meet the requirements of this work in a cost-effective manner. The position will be funded through the Water and Sewer Public Enterprise fund. The position will be filled, trained, and deployed as soon as practicable while taking into account department and service transition needs. No new funding is required for the position, and it is projected to reduce overall expenses.

FINANCIAL IMPACT:

No additional funds required.



Union County, NC

Staff Report

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

File #: 24-856

Agenda Date: 12/16/2024

TITLE:

Contract Amendment - Audit Services

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the Board Chair 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 Board Chair's discretion.

PRIOR BOARD ACTIONS:

- 1) April 18, 2022, Regular Meeting, Agenda Item # 22-212 - Approved contract for FY2022 Financial Audit and Authorized Chairman to execute.
- 2) May 5, 2023, Regular Meeting, Agenda Item # 23-236 - Approved FY2023 Financial Audit and authorized Chairman to execute.
- 3) April 1, 2024, Regular Meeting, Agenda # 24-209 - Approved FY2024 Financial Audit and Authorized Chairman to execute.

BACKGROUND:

Through Request for Proposals (RFP) 2022-039, Cherry Bekaert, LLP was awarded the financial audit contract to provide auditing services for Union County. As required by the North Carolina Local Government Commission (LGC), the auditing contract must be awarded on an annual basis with approval from the Board of Commissioners. This request is to award a contract to Cherry Bekaert to perform the financial audit of the County's accounting records for FY2024.

The contract terms for auditing services includes fee for testing of five major grant programs for single audit testing. During FY2024, the County saw an increase in major grant programs resulting in a total of eleven programs tested. The original contract approved by the BOCC in April estimated there would be an additional four programs tested resulting in a contract amount not to exceed \$146,000. The additional major programs tested resulted in not to exceed amount of \$156,000 requiring an amendment to the FY2024 audit contract. The contract amendment requires the Chair's signature based on the Local Government Commission audit contract regulations.

FINANCIAL IMPACT:

The total cost will be \$156,000: \$126,000 to perform the financial audit and which includes testing for five Single Audit grant programs, as well as \$5,000 for each Single Audit program over five. The total not to exceed amount is increasing overall by \$10,000.

Whereas	Primary Government Unit
and	Discretely Presented Component Unit (DPCU) (if applicable)
and	Auditor

entered into a contract in which the Auditor agreed to audit the accounts of the Primary Government Unit and DPCU (if applicable)

for

Fiscal Year Ending		and originally to be submitted to the LGC on	Date

hereby agree that it is now necessary that the contract be modified as follows.

Modification to date submitted to LGC	Original date	Modified date
	Original fee	Modified fee
Modification to fee		

Primary **Other**
(choose 1)(choose 0-2)

Reason(s) for Contract Amendment

- Change in scope
- Issue with unit staff/turnover/workload
- Issue with auditor staff/turnover/workload
- Third-party financial statements not prepared by agreed-upon date
- Unit did not have bank reconciliations complete for the audit period
- Unit did not have reconciliations between subsidiary ledgers and general ledger complete
- Unit did not post previous years adjusting journal entries resulting in incorrect beginning balances in the general ledger
- Unit did not have information required for audit complete by the agreed-upon time
- Delay in component unit reports
- Software - implementation issue
- Software - system failure
- Software - ransomware/cyberattack
- Natural or other disaster
- Other (please explain)

Plan to Prevent Future Late Submissions

If the amendment is submitted to modify the date the audit will be submitted to the LGC, please indicate the steps the unit and auditor will take to prevent late filing of audits in subsequent years. Audits are due to the LGC four months after fiscal year end. Indicate NA if this is an amendment due to a change in cost only.

Additional Information

Please provide any additional explanation or details regarding the contract modification.

By their signatures on the following pages, the Auditor, the Primary Government Unit, and the DPCU (if applicable), agree to these modified terms.

SIGNATURE PAGE

AUDIT FIRM

Audit Firm*	
Authorized Firm Representative* (typed or printed)	Signature*
Date*	Email Address

GOVERNMENTAL UNIT

Governmental Unit*	
Date Primary Government Unit Governing Board Approved Amended Audit Contract* (If required by governing board policy)	
Mayor/Chairperson* (typed or printed)	Signature*
Date	Email Address

Chair of Audit Committee (typed or printed, or "NA")	Signature
Date	Email Address

GOVERNMENTAL UNIT – PRE-AUDIT CERTIFICATE
ONLY REQUIRED IF FEES ARE MODIFIED IN THE AMENDED CONTRACT
(Pre-audit certificate not required for hospitals)

Required by G.S. 159-28(a1) or G.S. 115C-441(a1)

This instrument has been pre-audited in the manner required by The Local Government Budget and Fiscal Control Act or by the School Budget and Fiscal Control Act.

Primary Governmental Unit Finance Officer*	Signature*
Date of Pre-Audit Certificate*	Email Address*

**SIGNATURE PAGE – DPCU
(complete only if applicable)**

DISCRETELY PRESENTED COMPONENT UNIT

DPCU	
Date DPCU Governing Board Approved Amended Audit Contract (If required by governing board policy)	
DPCU Chairperson (typed or printed)	Signature
Date	Email Address

Chair of Audit Committee (typed or printed, or "NA")	Signature
Date	Email Address

DPCU – PRE-AUDIT CERTIFICATE
ONLY REQUIRED IF FEES ARE MODIFIED IN THE AMENDED CONTRACT
(Pre-audit certificate not required for hospitals)

Required by G.S. 159-28(a1) or G.S. 115C-441(a1)

This instrument has been pre-audited in the manner required by The Local Government Budget and Fiscal Control Act or by the School Budget and Fiscal Control Act.

DPCU Finance Officer (typed or printed)	Signature
Date of Pre-Audit Certificate	Email Address



Union County, NC

Staff Report

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

File #: 24-848

Agenda Date: 12/16/2024

TITLE:

Resolution - Adopt Board of Commissioners' 2025 Regular Meeting Schedule

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt the Resolution for the Regular Meeting Schedule of the Union County Board of Commissioners for 2025.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This resolution is for the adoption of the Board of Commissioners' meeting schedule for 2025, which includes its regular meetings as shown on Attachment "A" to the resolution.

FINANCIAL IMPACT:

None.



OFFICE OF THE COMMISSIONERS AND MANAGER

500 N. Main St., Room 921 • Monroe, NC 28112 • Phone (704)283-3810 • Fax (704)282-0121

RESOLUTION ADOPTING THE REGULAR MEETING SCHEDULE OF THE UNION COUNTY BOARD OF COMMISSIONERS FOR 2025

WHEREAS, the Union County Board of Commissioners previously adopted a meeting schedule for the year 2024; and

WHEREAS, the Board desires to adopt its regular meeting schedule for the year 2025, as shown on Attachment “A” to this resolution.

NOW, THEREFORE, be it resolved by the Union County Board of Commissioners as follows:

1. The Board does hereby adopt its regular meeting schedule for 2025, as shown on Attachment “A” to this resolution.

Adopted this the 16th day of December, 2024.

ATTEST:

Lynn G. West, Clerk to the Board

Melissa Merrell, Chair
Union County Board of Commissioners

Attachment A

**2025 REGULAR MEETING SCHEDULE
UNION COUNTY BOARD OF COMMISSIONERS
500 North Main Street
Monroe, NC 28112**

MEETING DATE	MEETING TIME
Monday, January 6, 2025	5:15 p.m.
Tuesday, January 21, 2025 (*Monday, January 20 th is a holiday – Dr. Martin Luther King, Jr. Birthday)	5:15 p.m.
Monday, February 3, 2025	5:15 p.m.
Tuesday, February 18, 2025 (* Monday, February 17 th is a holiday - Presidents’ Day)	5:15 p.m.
Monday, March 3, 2025	5:15 p.m.
Monday, March 17, 2025	5:15 p.m.
Monday, April 7, 2025	5:15 p.m.
Monday, April 21, 2025	5:15 p.m.
Monday, May 5, 2025	5:15 p.m.
Monday, May 19, 2025	5:15 p.m.
Monday, June 2, 2025	5:15 p.m.
Monday, June 16, 2025	5:15 p.m.
Monday, July 14, 2025 (*2 nd Monday of month)	5:15 p.m.
Monday, August 11, 2025 (*2 nd Monday of month)	5:15 p.m.
Tuesday, September 2, 2025 (*Monday, September 1 st is a holiday - Labor Day)	5:15 p.m.
Monday, September 15, 2025	5:15 p.m.
Monday, October 6, 2025	5:15 p.m.
Monday, October 20, 2025	5:15 p.m.
Monday, November 3, 2025	5:15 p.m.
Monday, November 17, 2025	5:15 p.m.
Monday, December 8, 2025 (2 nd Monday of month)	5:15 p.m.

Regular Meetings are generally held on the 1st and 3rd Monday of the month in the Meeting Chamber on the 1st floor of the Union County Government Center located at 500 North Main Street, Monroe N.C. When a regular meeting would fall on a holiday, the meeting is typically held on Tuesday. Above is the official schedule, with the specific dates and times for each meeting.

*NOTE: The official start time for regular meetings is 5:15 p.m. Unless otherwise indicated on each meeting’s agenda, Closed Sessions are generally held from 5:15-6:00 p.m. and the public portion of regular meetings is generally held at 6:00 p.m. following Closed Session. Closed Sessions are held in the Commissioner Stony D. Rushing Conference Meeting Room on the 1st floor. As indicated on a meeting’s agenda, the Board may also hold public work sessions during the regular meeting time from 5:15-6:00 p.m.



Union County, NC

Staff Report

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

File #: 24-853

Agenda Date: 12/16/2024

TITLE:

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Draft minutes have been provided to the Board for review and approval on the consent agenda.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 24-828

Agenda Date: 12/16/2024

TITLE:

Tax Refunds, Releases and Prorations Approved by Finance Officer

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than \$100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for October 2024 NCVTS releases and refunds less than \$100 and prorations approved by the finance officer.

FINANCIAL IMPACT:

None.



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
AKINS, STEVEN DANIEL	AKINS, STEVEN DANIEL		7101 VALLEY HAVEN DR		CHARLOTTE, NC 28211	Proration	0079176803	LCX2624	AUTHORIZED	751543415	Refund Generated due to proration on Bill #0079176803-2024-2024-0000-00	Vehicle Sold	10/08/2024	10/9/2024 8:06:41 AM	001	Tax	(\$46.42)	\$0.00	(\$46.42)
															600	Tax	(\$52.63)	\$0.00	(\$52.63)
															019	Tax	(\$18.15)	\$0.00	(\$18.15)
															002	Tax	(\$106.45)	\$0.00	(\$106.45)
															003	Tax	(\$4.98)	\$0.00	(\$4.98)
															004	Tax	(\$8.31)	\$0.00	(\$8.31)
005	Tax	(\$1.11)	\$0.00	(\$1.11)															
Refund																			\$238.05
ALFARO, MICHAEL SEAN MARRERO	ALFARO, MICHAEL SEAN MARRERO	MARRERO, ERIN BROOKE	2410 FLYER LN	APT 106	INDIAN LAND, SC 29707	Proration	0078654593	EHS1102	AUTHORIZED	863069890	Refund Generated due to proration on Bill #0078654593-2023-2023-0000-00	Reg. Out of state	10/29/2024	10/30/2024 11:42:59 AM	001	Tax	(\$6.45)	(\$0.30)	(\$6.75)
															500	Tax	(\$15.22)	(\$0.76)	(\$15.98)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$1.65)	(\$0.09)	(\$1.74)
															002	Tax	(\$14.80)	(\$0.74)	(\$15.54)
															003	Tax	(\$0.69)	(\$0.04)	(\$0.73)
004	Tax	(\$1.15)	(\$0.06)	(\$1.21)															
005	Tax	(\$0.15)	(\$0.01)	(\$0.16)															
Refund																			\$42.11
ALFARO, MICHAEL SEAN MARRERO	ALFARO, MICHAEL SEAN MARRERO		2410 FLYER LN	APT 106	INDIAN LAND, SC 29707	Proration	0079850348	LCW2758	AUTHORIZED	863069888	Refund Generated due to proration on Bill #0079850348-2024-2024-0000-00	Reg. Out of state	10/29/2024	10/30/2024 11:42:59 AM	001	Tax	(\$31.62)	\$0.00	(\$31.62)
															500	Tax	(\$74.57)	\$0.00	(\$74.57)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$10.13)	\$0.00	(\$10.13)
															002	Tax	(\$72.48)	\$0.00	(\$72.48)
															003	Tax	(\$3.39)	\$0.00	(\$3.39)
004	Tax	(\$5.66)	\$0.00	(\$5.66)															
005	Tax	(\$0.76)	\$0.00	(\$0.76)															
Refund																			\$198.61
BARBER, FREDRICK DOUGLAS	BARBER, FREDRICK DOUGLAS		5102 STACK RD		MONROE, NC 28112	Adjustment < \$100	0061215111	RAW4596	PENDING	644152572	Refund Generated due to adjustment on Bill #0061215111-2023-2023-0000-00	Over Assessment	10/07/2024		001	Tax	(\$4.75)	\$0.00	(\$4.75)
															027	Tax	(\$1.58)	\$0.00	(\$1.58)
															002	Tax	(\$10.88)	\$0.00	(\$10.88)
															003	Tax	(\$0.51)	\$0.00	(\$0.51)
															004	Tax	(\$0.85)	\$0.00	(\$0.85)
															005	Tax	(\$0.11)	\$0.00	(\$0.11)
Refund																			\$18.68
BARRETT, AMY KRISTINE	BARRETT, AMY KRISTINE		5821 CHERRY HOLLOW LN		MATTHEWS, NC 28104	Proration	0065823297	XZF9530	AUTHORIZED	644152626	Refund Generated due to proration on Bill #0065823297-2023-2023-0000-00	Vehicle Sold	10/07/2024	10/8/2024 8:14:28 AM	001	Tax	(\$15.80)	\$0.00	(\$15.80)
															800	Tax	(\$4.36)	\$0.00	(\$4.36)
															002	Tax	(\$36.23)	\$0.00	(\$36.23)
															003	Tax	(\$1.69)	\$0.00	(\$1.69)
															004	Tax	(\$2.83)	\$0.00	(\$2.83)
															005	Tax	(\$0.37)	\$0.00	(\$0.37)
Refund																			\$61.28
BATISTA, ALEXANDRA SANDY	BATISTA, ALEXANDRA SANDY		401 E SOUTH MAIN ST	APT 114	WAXHAW, NC 28173	Adjustment < \$100	0076772864	TEJ9082	PENDING	1.074E+09	Refund Generated due to adjustment on Bill #0076772864-2023-2023-0000-00	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$24.42)	(\$1.22)	(\$25.64)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															500	Tax	\$18.71	\$0.94	\$19.65
															500	Vehicle Fee	\$25.00	\$0.00	\$25.00
															028	Tax	\$2.04	\$0.10	\$2.14
002	Tax	\$0.00	\$0.00	\$0.00															
003	Tax	\$0.00	\$0.00	\$0.00															
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$8.85
BOLSTAD, MARAH ASHLEE	BOLSTAD, MARAH ASHLEE		1038 FEATHER OAK LN		MATTHEWS, NC 28104	Adjustment < \$100	0080009902	VDZ4640	PENDING	966231603	Refund Generated due to adjustment on Bill #0080009902-2024-2024-0000-00	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$16.23)	\$0.00	(\$16.23)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															700	Tax	\$6.98	\$0.00	\$6.98
															020	Tax	\$1.73	\$0.00	\$1.73
															002	Tax	\$0.00	\$0.00	\$0.00
003	Tax	\$0.00	\$0.00	\$0.00															
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$37.52
BORANS, PETER GREGORY	BORANS, PETER GREGORY		604 SORRELL SPRING CT		WAXHAW, NC 28173	Proration	0074097869	KDP1331	AUTHORIZED	643574010	Refund Generated due to proration on Bill #0074097869-2023-2023-0000-00	Vehicle Sold	10/03/2024	10/4/2024 2:26:55 PM	001	Tax	(\$71.09)	\$0.00	(\$71.09)
															026	Tax	(\$16.33)	\$0.00	(\$16.33)
															002	Tax	(\$163.01)	\$0.00	(\$163.01)
															003	Tax	(\$7.62)	\$0.00	(\$7.62)
															004	Tax	(\$12.72)	\$0.00	(\$12.72)
															005	Tax	(\$1.70)	\$0.00	(\$1.70)
Refund																			\$272.47
BRIDGES, FRANK ANSON	BRIDGES, FRANK ANSON		5706 CHERRY HOLLOW LN		MATTHEWS, NC 28104	Proration	0032102005	DJW4926	AUTHORIZED	643573314	Refund Generated due to proration on Bill #0032102005-2023-2023-0000-00	Vehicle Sold	10/03/2024	10/4/2024 2:29:12 PM	001	Tax	(\$9.10)	\$0.00	(\$9.10)
															800	Tax	(\$2.51)	\$0.00	(\$2.51)
															002	Tax	(\$20.86)	\$0.00	(\$20.86)
															003	Tax	(\$0.98)	\$0.00	(\$0.98)
															004	Tax	(\$1.63)	\$0.00	(\$1.63)
															005	Tax	(\$0.22)	\$0.00	(\$0.22)
Refund																			\$35.30



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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															
BRODSKY, STEVE	BRODSKY, STEVE		1409 HEATHER LN		MONROE, NC 28110	Adjustment < \$100	0080628224	RJL6963	PENDING	755779787	Refund Generated due to adjustment on Bill #0080628224-2024-2024-0000-00	Over Assessment	10/31/2024		001	Tax	(\$6.22)	\$0.00	(\$6.22)															
															200	Tax	(\$19.14)	\$0.00	(\$19.14)															
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															002	Tax	(\$14.25)	\$0.00	(\$14.25)															
															003	Tax	(\$0.66)	\$0.00	(\$0.66)															
															004	Tax	(\$1.11)	\$0.00	(\$1.11)															
005	Tax	(\$0.14)	\$0.00	(\$0.14)																														
Refund																			\$41.52															
BRODSKY, STEVE	BRODSKY, STEVE		1409 HEATHER LN		MONROE, NC 28110	Adjustment < \$100	0080628329	CR65241	PENDING	647566950	Refund Generated due to adjustment on Bill #0080628329-2024-2024-0000-00	Over Assessment	10/30/2024		001	Tax	(\$12.11)	\$0.00	(\$12.11)															
															200	Tax	(\$37.29)	\$0.00	(\$37.29)															
															002	Tax	(\$27.76)	\$0.00	(\$27.76)															
															003	Tax	(\$1.30)	\$0.00	(\$1.30)															
															004	Tax	(\$2.17)	\$0.00	(\$2.17)															
															005	Tax	(\$0.29)	\$0.00	(\$0.29)															
Refund																			\$80.92															
BRODSKY, STEVE	BRODSKY, STEVE		1409 HEATHER LN		MONROE, NC 28110	Adjustment < \$100	0080628362	CR65242	PENDING	647566920	Refund Generated due to adjustment on Bill #0080628362-2024-2024-0000-00	Over Assessment	10/30/2024		001	Tax	(\$2.35)	\$0.00	(\$2.35)															
															200	Tax	(\$7.23)	\$0.00	(\$7.23)															
															002	Tax	(\$5.39)	\$0.00	(\$5.39)															
															003	Tax	(\$0.25)	\$0.00	(\$0.25)															
															004	Tax	(\$0.42)	\$0.00	(\$0.42)															
															005	Tax	(\$0.06)	\$0.00	(\$0.06)															
Refund																			\$15.70															
BROWN, DANIEL WILSON	BROWN, DANIEL WILSON	HUANG, QING	1904 TRADING PATH LN		WAXHAW, NC 28173	Proration	0040667304	7762SP	AUTHORIZED	862342696	Refund Generated due to proration on Bill #0040667304-2023-2023-0000-00	Vehicle Sold	10/25/2024	10/28/2024 8:23:17 AM	001	Tax	(\$7.99)	\$0.00	(\$7.99)															
															500	Tax	(\$18.85)	\$0.00	(\$18.85)															
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															028	Tax	(\$2.05)	\$0.00	(\$2.05)															
															002	Tax	(\$18.32)	\$0.00	(\$18.32)															
															003	Tax	(\$0.86)	\$0.00	(\$0.86)															
															004	Tax	(\$1.43)	\$0.00	(\$1.43)															
															005	Tax	(\$0.19)	\$0.00	(\$0.19)															
															Refund																			\$49.89
															BROWN, SCOTT ALLAN	BROWN, SCOTT ALLAN	BROWN, JENNIFER TAGGART	2840 UNIONVILLE INDIAN TR		INDIAN TRAIL, NC 28079	Proration	0027547019	AC6724	AUTHORIZED	646757448	Refund Generated due to proration on Bill #0027547019-2023-2023-0000-00	Vehicle Sold	10/25/2024	10/28/2024 8:21:43 AM	001	Tax	(\$4.04)	\$0.00	(\$4.04)
023	Tax	(\$1.09)	\$0.00	(\$1.09)																														
002	Tax	(\$9.26)	\$0.00	(\$9.26)																														
003	Tax	(\$0.43)	\$0.00	(\$0.43)																														
004	Tax	(\$0.72)	\$0.00	(\$0.72)																														
005	Tax	(\$0.10)	\$0.00	(\$0.10)																														
Refund																			\$15.64															
CA CAUDLE LLC	CA CAUDLE LLC		301 WOODBERRY DR		WINGATE, NC 28174	Proration	0069231417	REH8367	AUTHORIZED	643748766	Refund Generated due to proration on Bill #0069231417-2024-2024-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:16:36 AM	001	Tax	(\$4.31)	\$0.00	(\$4.31)															
															022	Tax	(\$2.26)	\$0.00	(\$2.26)															
															002	Tax	(\$9.88)	\$0.00	(\$9.88)															
															003	Tax	(\$0.46)	\$0.00	(\$0.46)															
															004	Tax	(\$0.77)	\$0.00	(\$0.77)															
															005	Tax	(\$0.10)	\$0.00	(\$0.10)															
Refund																			\$17.78															
CAROLINA DEVELOPMENT SERVICES LLC	CAROLINA DEVELOPMENT SERVICES LLC		2627 BRECKONRID GE CENTER		MONROE, NC 28110	Proration	0076338507	JC4815	AUTHORIZED	750836863	Refund Generated due to proration on Bill #0076338507-2023-2023-0000-00	Vehicle Sold	10/03/2024	10/4/2024 2:26:41 PM	001	Tax	(\$17.65)	\$0.00	(\$17.65)															
															200	Tax	(\$54.34)	\$0.00	(\$54.34)															
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															002	Tax	(\$40.47)	\$0.00	(\$40.47)															
															003	Tax	(\$1.89)	\$0.00	(\$1.89)															
															004	Tax	(\$3.16)	\$0.00	(\$3.16)															
005	Tax	(\$0.42)	\$0.00	(\$0.42)																														
Refund																			\$177.93															
CARTER, RAY LEON	CARTER, RAY LEON	CARTER, WANDA M	2306 BEECHWOOD DR		WAXHAW, NC 28173	Proration	0007046084	CF1664	AUTHORIZED	858097736	Refund Generated due to proration on Bill #0007046084-2023-2023-0000-00	Vehicle Sold	10/03/2024	10/4/2024 2:29:00 PM	001	Tax	(\$1.61)	\$0.00	(\$1.61)															
															101	Tax	(\$0.59)	\$0.00	(\$0.59)															
															101	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															026	Tax	(\$0.37)	\$0.00	(\$0.37)															
															002	Tax	(\$3.69)	\$0.00	(\$3.69)															
															003	Tax	(\$0.17)	\$0.00	(\$0.17)															
004	Tax	(\$0.29)	\$0.00	(\$0.29)																														
005	Tax	(\$0.04)	\$0.00	(\$0.04)																														
Refund																			\$6.76															
CAUDLE, CHERYL SUMNER	CAUDLE, CHERYL SUMNER		7522 WAXHAW HWY		WAXHAW, NC 28173	Proration	0078642679	CCSA	AUTHORIZED	322747551	Refund Generated due to proration on Bill #0078642679-2023-2023-0000-00	Vehicle Totalled	10/17/2024	10/18/2024 8:17:18 AM	001	Tax	(\$5.99)	\$0.00	(\$5.99)															
															028	Tax	(\$1.53)	\$0.00	(\$1.53)															
															003	Tax	(\$0.64)	\$0.00	(\$0.64)															
Refund																			\$8.16															
CEGLIE, ANTOINETTE MARIA	CEGLIE, ANTOINETTE MARIA		2009 HELLER DR		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080094126	VEB9156	PENDING	966231063	Refund Generated due to adjustment on Bill #0080094126-2024-2024-0000-00	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00															
															200	Tax	(\$43.97)	\$0.00	(\$43.97)															
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)															
															600	Tax	\$16.19	\$0.00	\$16.19															
															019	Tax	\$5.58	\$0.00	\$5.58															
															002	Tax	\$0.00	\$0.00	\$0.00															
															003	Tax	\$0.00	\$0.00	\$0.00															
															004	Tax	\$0.00	\$0.00	\$0.00															
															005	Tax	\$0.00	\$0.00	\$0.00															
															Refund																			\$52.20



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
CELELLA, MICHAEL JOSEPH	CELELLA, MICHAEL JOSEPH		1041 ENDERBURY DR		INDIAN TRAIL, NC 28079	Proration	0060713549	DIELVN	AUTHORIZED	753853611	Refund Generated due to proration on Bill #0060713549-2023-2023-0000-00	Vehicle Sold	10/22/2024	10/23/2024 10:28:12 AM	001	Tax	(\$11.05)	\$0.00	(\$11.05)
															600	Tax	(\$12.53)	\$0.00	(\$12.53)
															023	Tax	(\$2.99)	\$0.00	(\$2.99)
															002	Tax	(\$25.35)	\$0.00	(\$25.35)
															003	Tax	(\$1.19)	\$0.00	(\$1.19)
															004	Tax	(\$1.98)	\$0.00	(\$1.98)
005	Tax	(\$0.26)	\$0.00	(\$0.26)															
Refund																			\$55.35
CEURVORST-DARNELL, JANE ELIZABETH	CEURVORST-DARNELL, JANE ELIZABETH	CEURVORST, ETHAN EDWARD	2206 IRBY RD		MONROE, NC 28112	Proration	0073631639	RBS1581	AUTHORIZED	645675288	Refund Generated due to proration on Bill #0073631639-2023-2023-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:11:15 AM	001	Tax	(\$17.39)	\$0.00	(\$17.39)
															029	Tax	(\$3.51)	\$0.00	(\$3.51)
															002	Tax	(\$39.88)	\$0.00	(\$39.88)
															003	Tax	(\$1.87)	\$0.00	(\$1.87)
															004	Tax	(\$3.11)	\$0.00	(\$3.11)
															005	Tax	(\$0.42)	\$0.00	(\$0.42)
Refund																			\$66.18
CHADE, SATISH	CHADE, SATISH		1124 ASHE MEADOW DR		INDIAN TRAIL, NC 28079	Proration	0075125159	KMP5738	AUTHORIZED	644152650	Refund Generated due to proration on Bill #0075125159-2023-2023-0000-00	Vehicle Sold	10/07/2024	10/8/2024 8:14:24 AM	001	Tax	(\$2.05)	\$0.00	(\$2.05)
															016	Tax	(\$0.63)	\$0.00	(\$0.63)
															002	Tax	(\$4.69)	\$0.00	(\$4.69)
															003	Tax	(\$0.22)	\$0.00	(\$0.22)
															004	Tax	(\$0.37)	\$0.00	(\$0.37)
															005	Tax	(\$0.05)	\$0.00	(\$0.05)
Refund																			\$8.01
CHARTIER, JODY ANNE	CHARTIER, JODY ANNE		3004 SUNLIGHT PATH		MONROE, NC 28110	Adjustment < \$100	0076143992	DMF1415	PENDING	965361960	Refund Generated due to adjustment on Bill #0076143992-2023-2023-0000	Situs error	10/03/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$65.98)	\$0.00	(\$65.98)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															600	Tax	\$24.29	\$0.00	\$24.29
															019	Tax	\$6.85	\$0.00	\$6.85
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
															004	Tax	\$0.00	\$0.00	\$0.00
															005	Tax	\$0.00	\$0.00	\$0.00
															Refund				
CHENGELIS, THOMAS ROBIN	CHENGELIS, THOMAS ROBIN		3402 TOM STARNES RD		MONROE, NC 28112	Proration	0078468574	PEY9570	AUTHORIZED	646569822	Refund Generated due to proration on Bill #0078468574-2023-2023-0000-00	Vehicle Sold	10/24/2024	10/25/2024 1:09:34 PM	001	Tax	(\$73.19)	\$0.00	(\$73.19)
															029	Tax	(\$14.75)	\$0.00	(\$14.75)
															002	Tax	(\$167.80)	\$0.00	(\$167.80)
															003	Tax	(\$7.85)	\$0.00	(\$7.85)
															004	Tax	(\$13.09)	\$0.00	(\$13.09)
															005	Tax	(\$1.75)	\$0.00	(\$1.75)
Refund																			\$278.43
CHRISTENBUR Y, JENNIFER ALLENE	CHRISTENBUR Y, JENNIFER ALLENE		8136 SAPIWOOD CT		MATTHEWS, NC 28104	Proration	0057825958	RAE7926	AUTHORIZED	751765574	Refund Generated due to proration on Bill #0057825958-2023-2023-0000-00	Vehicle Totalled	10/09/2024	10/10/2024 8:11:50 AM	001	Tax	(\$18.34)	\$0.00	(\$18.34)
															700	Tax	(\$20.90)	\$0.00	(\$20.90)
															020	Tax	(\$5.37)	\$0.00	(\$5.37)
															002	Tax	(\$42.05)	\$0.00	(\$42.05)
															003	Tax	(\$1.97)	\$0.00	(\$1.97)
															004	Tax	(\$3.28)	\$0.00	(\$3.28)
005	Tax	(\$0.44)	\$0.00	(\$0.44)															
Refund																			\$92.35
CUEVAS, ALBERTO JOSE	CUEVAS, ALBERTO JOSE	CUEVAS, OLGA LIDIA	3074 CANE MILL RD		LANCASTER, SC 29720	Proration	0059406399	7173DU	AUTHORIZED	858097936	Refund Generated due to proration on Bill #0059406399-2023-2023-0000-00	Reg . Out of state	10/03/2024	10/4/2024 2:27:42 PM	001	Tax	(\$46.15)	\$0.00	(\$46.15)
															500	Tax	(\$108.86)	\$0.00	(\$108.86)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$11.85)	\$0.00	(\$11.85)
															002	Tax	(\$105.80)	\$0.00	(\$105.80)
															003	Tax	(\$4.95)	\$0.00	(\$4.95)
004	Tax	(\$8.26)	\$0.00	(\$8.26)															
005	Tax	(\$1.10)	\$0.00	(\$1.10)															
Refund																			\$286.97
CUEVAS, ALBERTO JOSE	CUEVAS, ALBERTO JOSE		3074 CANE MILL RD		LANCASTER, SC 29720	Proration	0070782742	TPH4540	AUTHORIZED	858097952	Refund Generated due to proration on Bill #0070782742-2023-2023-0000-00	Reg . Out of state	10/03/2024	10/4/2024 2:27:42 PM	001	Tax	(\$40.09)	\$0.00	(\$40.09)
															500	Tax	(\$94.60)	\$0.00	(\$94.60)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$10.30)	\$0.00	(\$10.30)
															002	Tax	(\$91.94)	\$0.00	(\$91.94)
															003	Tax	(\$4.30)	\$0.00	(\$4.30)
004	Tax	(\$7.18)	\$0.00	(\$7.18)															
005	Tax	(\$0.96)	\$0.00	(\$0.96)															
Refund																			\$249.37
DE JESUS MARRERO, JUAN CARLOS	DE JESUS MARRERO, JUAN CARLOS		613 WATERLEMON WAY		MONROE, NC 28110	Proration	0079897882	KBN4057	AUTHORIZED	755187279	Refund Generated due to proration on Bill #0079897882-2023-2023-0000-00	Vehicle Sold	10/29/2024	10/30/2024 11:42:42 AM	001	Tax	(\$9.86)	\$0.00	(\$9.86)
															900	Tax	(\$12.23)	\$0.00	(\$12.23)
															023	Tax	(\$2.67)	\$0.00	(\$2.67)
															002	Tax	(\$22.61)	\$0.00	(\$22.61)
															003	Tax	(\$1.06)	\$0.00	(\$1.06)
															004	Tax	(\$1.77)	\$0.00	(\$1.77)
005	Tax	(\$0.23)	\$0.00	(\$0.23)															
Refund																			\$50.43
DEEL, ZANE ALAN	DEEL, ZANE ALAN		5008 REVELATION WAY		MONROE, NC 28110	Proration	0074321428	HKJ7516	AUTHORIZED	755143851	Refund Generated due to proration on Bill #0074321428-2023-2023-0000-00	Vehicle Sold	10/28/2024	10/29/2024 8:06:36 AM	001	Tax	(\$10.85)	\$0.00	(\$10.85)
															600	Tax	(\$12.30)	\$0.00	(\$12.30)
															019	Tax	(\$3.47)	\$0.00	(\$3.47)
															002	Tax	(\$24.88)	\$0.00	(\$24.88)
															003	Tax	(\$1.16)	\$0.00	(\$1.16)
															004	Tax	(\$1.94)	\$0.00	(\$1.94)
005	Tax	(\$0.26)	\$0.00	(\$0.26)															
Refund																			\$54.86



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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															
DEWALD, JEFFREY THOMAS	DEWALD, JEFFREY THOMAS		4001 VAN SNEED		MARSHVILLE, NC 28103	Adjustment < \$100	0080085163	VBA6458	PENDING	858872024	Refund Generated due to adjustment on Bill #0080085163-2024-2024-0000	Situa error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00															
															200	Tax	(\$31.00)	\$0.00	(\$31.00)															
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)															
															027	Tax	\$4.06	\$0.00	\$4.06															
															002	Tax	\$0.00	\$0.00	\$0.00															
															003	Tax	\$0.00	\$0.00	\$0.00															
															004	Tax	\$0.00	\$0.00	\$0.00															
															005	Tax	\$0.00	\$0.00	\$0.00															
															Refund																			\$56.94
															DHAKAL, ROSY	DHAKAL, ROSY		2209 AUTUMN OLIVE LN		MATTHEWS, NC 28104	Proration	0078772974	KBN9803	AUTHORIZED	750585010	Refund Generated due to proration on Bill #0078772974-2023-2023-0000-00	Vehicle Sold	10/02/2024	10/3/2024 8:07:40 AM	001	Tax	(\$6.89)	\$0.00	(\$6.89)
700	Tax	(\$7.85)	\$0.00	(\$7.85)																														
020	Tax	(\$2.02)	\$0.00	(\$2.02)																														
002	Tax	(\$15.80)	\$0.00	(\$15.80)																														
003	Tax	(\$0.74)	\$0.00	(\$0.74)																														
004	Tax	(\$1.23)	\$0.00	(\$1.23)																														
005	Tax	(\$0.16)	\$0.00	(\$0.16)																														
Refund																														\$34.69				
DIBENEDETTO, JENNIFER MAE	DIBENEDETTO, JENNIFER MAE		320 HONEYWOOD LN		MONROE, NC 28110	Proration	0074342065	RAS4639	AUTHORIZED	645494346	Refund Generated due to proration on Bill #0074342065-2023-2023-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:18:09 AM																001	Tax	(\$14.95)	\$0.00	(\$14.95)
																														019	Tax	(\$4.78)	\$0.00	(\$4.78)
															002	Tax	(\$34.27)	\$0.00	(\$34.27)															
															003	Tax	(\$1.60)	\$0.00	(\$1.60)															
															004	Tax	(\$2.67)	\$0.00	(\$2.67)															
															005	Tax	(\$0.36)	\$0.00	(\$0.36)															
															Refund																			\$58.63
															DIGITAL HOME SYSTEMS	DIGITAL HOME SYSTEMS	SHEPARD, CHRISTOPHER JORDAN	3604 SANDBERRY DR		WAXHAW, NC 28173	Adjustment < \$100	0080170273	LDP2432	PENDING	1.074E+09	Refund Generated due to adjustment on Bill #0080170273-2024-2024-0000	Situa error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
																														200	Tax	(\$179.80)	\$0.00	(\$179.80)
																														200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
500	Tax	\$137.76	\$0.00	\$137.76																														
500	Vehicle Fee	\$25.00	\$0.00	\$25.00																														
028	Tax	\$18.71	\$0.00	\$18.71																														
002	Tax	\$0.00	\$0.00	\$0.00																														
003	Tax	\$0.00	\$0.00	\$0.00																														
004	Tax	\$0.00	\$0.00	\$0.00																														
005	Tax	\$0.00	\$0.00	\$0.00																														
Refund																			\$28.33															
DIPPERT, TIFFANY SUZANNE	DIPPERT, TIFFANY SUZANNE		1526 TIDAL CREEK WAY		MYRTLE BEACH, SC 29588	Proration	0016573473	TFV7025	AUTHORIZED	753287423	Refund Generated due to proration on Bill #0016573473-2023-2023-0000-00	Reg , Out of state	10/18/2024	10/21/2024 8:12:21 AM	001	Tax	(\$4.33)	\$0.00	(\$4.33)															
															700	Tax	(\$4.94)	\$0.00	(\$4.94)															
															020	Tax	(\$1.27)	\$0.00	(\$1.27)															
															002	Tax	(\$9.93)	\$0.00	(\$9.93)															
															003	Tax	(\$0.46)	\$0.00	(\$0.46)															
															004	Tax	(\$0.77)	\$0.00	(\$0.77)															
															005	Tax	(\$0.10)	\$0.00	(\$0.10)															
															Refund																			\$21.80
															DOMINGUEZ LLAMAS, JESUS	DOMINGUEZ LLAMAS, JESUS		908 MIKWOOD LN		MONROE, NC 28110	Proration	0078271093	LBT4323	AUTHORIZED	751769102	Refund Generated due to proration on Bill #0078271093-2023-2023-0000-00	Vehicle Totalled	10/10/2024	10/11/2024 11:12:37 AM	001	Tax	(\$49.46)	(\$2.47)	(\$51.93)
																														200	Tax	(\$152.30)	\$0.00	(\$159.91)
200	Vehicle Fee	\$0.00	\$0.00	\$0.00																														
002	Tax	(\$113.41)	(\$5.68)	(\$119.09)																														
003	Tax	(\$5.31)	(\$0.27)	(\$5.58)																														
004	Tax	(\$8.85)	(\$0.44)	(\$9.29)																														
005	Tax	(\$1.18)	(\$0.06)	(\$1.24)																														
Refund																														\$347.04				
DRUMMOND, BRENDA DEANNE	DRUMMOND, BRENDA DEANNE	DRUMMOND, MARK WADE	8500 BLACKGOLD CIR		WAXHAW, NC 28173	Proration	0076547145	TFX9366	AUTHORIZED	644180466	Refund Generated due to proration on Bill #0076547145-2023-2023-0000-00	Vehicle Sold	10/08/2024	10/9/2024 8:06:24 AM																001	Tax	(\$95.48)	\$0.00	(\$95.48)
																														026	Tax	(\$21.94)	\$0.00	(\$21.94)
															002	Tax	(\$218.93)	\$0.00	(\$218.93)															
															003	Tax	(\$10.24)	\$0.00	(\$10.24)															
															004	Tax	(\$17.09)	\$0.00	(\$17.09)															
															005	Tax	(\$2.28)	\$0.00	(\$2.28)															
															Refund																			\$365.96
															DUNLAP, ANNA BJORKMAN	DUNLAP, ANNA BJORKMAN		1010 DOWNING CT		INDIAN TRAIL, NC 28079	Proration	0017930991	TZY1085	AUTHORIZED	752851281	Refund Generated due to proration on Bill #0017930991-2023-2023-0000-00	Vehicle Sold	10/16/2024	10/17/2024 8:36:26 AM	001	Tax	(\$6.35)	\$0.00	(\$6.35)
																														600	Tax	(\$7.20)	\$0.00	(\$7.20)
																														026	Tax	(\$1.46)	\$0.00	(\$1.46)
002	Tax	(\$14.57)	\$0.00	(\$14.57)																														
003	Tax	(\$0.68)	\$0.00	(\$0.68)																														
004	Tax	(\$1.13)	\$0.00	(\$1.13)																														
005	Tax	(\$0.15)	\$0.00	(\$0.15)																														
Refund																														\$31.54				
DZANI, NAADEI	DZANI, NAADEI		2108 BLUE SKY MEADOWS DR		MONROE, NC 28110	Proration	0079770875	HHE2654	AUTHORIZED	754330892	Refund Generated due to proration on Bill #0079770875-2023-2023-0000-00	Vehicle Sold	10/24/2024	10/25/2024 1:09:40 PM																001	Tax	(\$44.40)	\$0.00	(\$44.40)
																														200	Tax	(\$136.72)	\$0.00	(\$136.72)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															002	Tax	(\$101.82)	\$0.00	(\$101.82)															
															003	Tax	(\$4.76)	\$0.00	(\$4.76)															
															004	Tax	(\$7.94)	\$0.00	(\$7.94)															
															005	Tax	(\$1.06)	\$0.00	(\$1.06)															
															Refund																			\$296.70



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
EARP, MICHAEL TROY	EARP, MICHAEL TROY		1905 SCUFFLE HILL DR		MONROE, NC 28110	Adjustment < \$100	0080099546	VBA6468	PENDING	966268503	Refund Generated due to adjustment on Bill #0080099546-2024-2024-0000	Situation error	10/08/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$4.47)	\$0.00	(\$4.47)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															980	Tax	\$0.18	\$0.00	\$0.18
															021	Tax	\$0.60	\$0.00	\$0.60
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
															004	Tax	\$0.00	\$0.00	\$0.00
															005	Tax	\$0.00	\$0.00	\$0.00
															Refund				
ECCUCOR INC	ECCUCOR INC		272D UNIONVILLE INDIAN TR		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080296235	VDF1325	PENDING	966231855	Refund Generated due to adjustment on Bill #0080296235-2024-2024-0000	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$133.01)	\$0.00	(\$133.01)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															600	Tax	\$48.97	\$0.00	\$48.97
															020	Tax	\$14.16	\$0.00	\$14.16
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
															004	Tax	\$0.00	\$0.00	\$0.00
															005	Tax	\$0.00	\$0.00	\$0.00
															Refund				
EDWARDS, MATTHEW LYNN	EDWARDS, MATTHEW LYNN		8903 NEW TOWN RD		WAXHAW, NC 28173	Proration	005971184	RCB5020	AUTHORIZED	645301416	Refund Generated due to proration on Bill #005971184-2023-2023-0000-00	Vehicle Sold	10/16/2024	10/17/2024 8:35:53 AM	001	Tax	(\$1.90)	\$0.00	(\$1.90)
															026	Tax	(\$0.44)	\$0.00	(\$0.44)
															002	Tax	(\$4.37)	\$0.00	(\$4.37)
															003	Tax	(\$0.21)	\$0.00	(\$0.21)
															004	Tax	(\$0.34)	\$0.00	(\$0.34)
															005	Tax	(\$0.04)	\$0.00	(\$0.04)
Refund																			\$7.30
ELZAYAT, MAJDI MOHAMMAD MUSTAF	ELZAYAT, MAJDI MOHAMMAD MUSTAF		3100 SHADOWY RETREAT DR		MATTHEWS, NC 28104	Proration	0052078806	TCA2056	AUTHORIZED	751768269	Refund Generated due to proration on Bill #0052078806-2023-2023-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:13:37 AM	001	Tax	(\$1.87)	\$0.00	(\$1.87)
															700	Tax	(\$2.13)	\$0.00	(\$2.13)
															023	Tax	(\$0.50)	\$0.00	(\$0.50)
															002	Tax	(\$4.28)	\$0.00	(\$4.28)
															003	Tax	(\$0.20)	\$0.00	(\$0.20)
															004	Tax	(\$0.33)	\$0.00	(\$0.33)
005	Tax	(\$0.04)	\$0.00	(\$0.04)															
Refund																			\$9.35
ESPOSITO, PASQUALE LOUIS	ESPOSITO, PASQUALE LOUIS		2812 VIDALIA CT		MONROE, NC 28110	Proration	0017922326	TYC1824	AUTHORIZED	755187790	Refund Generated due to proration on Bill #0017922326-2023-2023-0000-00	Vehicle Sold	10/29/2024	10/30/2024 11:42:03 AM	001	Tax	(\$2.12)	\$0.00	(\$2.12)
															200	Tax	(\$6.53)	\$0.00	(\$6.53)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$4.87)	\$0.00	(\$4.87)
															003	Tax	(\$0.22)	\$0.00	(\$0.22)
															004	Tax	(\$0.38)	\$0.00	(\$0.38)
005	Tax	(\$0.05)	\$0.00	(\$0.05)															
Refund																			\$14.17
FONSECA, CHRISTOPHER RAFAEL	FONSECA, CHRISTOPHER RAFAEL	FONSECA, ANDREA	2006 DOUGHTON LN		INDIAN TRAIL, NC 28079	Proration	0060671773	JBR7356	AUTHORIZED	753817960	Refund Generated due to proration on Bill #0060671773-2023-2023-0000-00	Vehicle Sold	10/21/2024	10/22/2024 8:10:13 AM	001	Tax	(\$34.93)	\$0.00	(\$34.93)
															600	Tax	(\$39.60)	\$0.00	(\$39.60)
															023	Tax	(\$9.44)	\$0.00	(\$9.44)
															002	Tax	(\$80.10)	\$0.00	(\$80.10)
															003	Tax	(\$3.74)	\$0.00	(\$3.74)
															004	Tax	(\$6.25)	\$0.00	(\$6.25)
005	Tax	(\$0.83)	\$0.00	(\$0.83)															
Refund																			\$174.89
FONSECA, CHRISTOPHER RAFAEL	FONSECA, CHRISTOPHER RAFAEL		2006 DOUGHTON LN		INDIAN TRAIL, NC 28079	Proration	0064659770	EBM1741	AUTHORIZED	753817953	Refund Generated due to proration on Bill #0064659770-2023-2023-0000-00	Vehicle Sold	10/21/2024	10/22/2024 8:10:13 AM	001	Tax	(\$35.75)	\$0.00	(\$35.75)
															600	Tax	(\$40.52)	\$0.00	(\$40.52)
															023	Tax	(\$9.66)	\$0.00	(\$9.66)
															002	Tax	(\$81.96)	\$0.00	(\$81.96)
															003	Tax	(\$3.83)	\$0.00	(\$3.83)
															004	Tax	(\$6.39)	\$0.00	(\$6.39)
005	Tax	(\$0.85)	\$0.00	(\$0.85)															
Refund																			\$178.96
FRANKLIN, RIKKETTA CYNETTE	FRANKLIN, RIKKETTA CYNETTE		668 MILE CREEK RD		EDGEWOOD, SC 29712	Proration	0076183916	KMP2978	AUTHORIZED	859164504	Refund Generated due to proration on Bill #0076183916-2023-2023-0000-00	Reg. Out of state	10/10/2024	10/11/2024 11:13:01 AM	001	Tax	(\$2.55)	\$0.00	(\$2.55)
															500	Tax	(\$6.02)	\$0.00	(\$6.02)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$0.66)	\$0.00	(\$0.66)
															002	Tax	(\$5.85)	\$0.00	(\$5.85)
															003	Tax	(\$0.27)	\$0.00	(\$0.27)
004	Tax	(\$0.46)	\$0.00	(\$0.46)															
005	Tax	(\$0.06)	\$0.00	(\$0.06)															
Refund																			\$15.87
GALEANO MIRANDA, ANGUI	GALEANO MIRANDA, ANGUI		3607 EDGEVIEW DR		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080034584	VEF1018	PENDING	966231252	Refund Generated due to adjustment on Bill #0080034584-2024-2024-0000	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$30.15)	\$0.00	(\$30.15)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															600	Tax	\$11.10	\$0.00	\$11.10
															023	Tax	\$3.07	\$0.00	\$3.07
															002	Tax	\$0.00	\$0.00	\$0.00
003	Tax	\$0.00	\$0.00	\$0.00															
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$45.98



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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														
GARNETT, AMY CONE	GARNETT, AMY CONE		302 LONGSIDE CT		LITTLE RIVER, SC 29566	Proration	0078242172	KBN2049	AUTHORIZED	863071664	Refund Generated due to proration on Bill #0078242172-2023-2023-0000-00	Reg. Out of state	10/29/2024	10/30/2024 11:42:09 AM	001	Tax	(\$16.13)	\$0.00	(\$16.13)														
															500	Tax	(\$36.07)	\$0.00	(\$36.07)														
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															028	Tax	(\$4.14)	\$0.00	(\$4.14)														
															002	Tax	(\$36.99)	\$0.00	(\$36.99)														
															003	Tax	(\$1.73)	\$0.00	(\$1.73)														
															004	Tax	(\$2.89)	\$0.00	(\$2.89)														
															005	Tax	(\$0.39)	\$0.00	(\$0.39)														
															Refund																		\$100.34
															GATES, MICHAEL AVERY	GATES, MICHAEL AVERY		1212 BRIONNE CT		WAXHAW, NC 28173	Proration	0044146896	DBC5621	AUTHORIZED	645495144	Refund Generated due to proration on Bill #0044146896-2023-2023-0000-00	Reg. Out of state	10/17/2024	10/18/2024 8:02:48 AM	001	Tax	(\$4.83)	\$0.00
015	Tax	(\$1.37)	\$0.00	(\$1.37)																													
002	Tax	(\$11.08)	\$0.00	(\$11.08)																													
003	Tax	(\$0.52)	\$0.00	(\$0.52)																													
004	Tax	(\$0.86)	\$0.00	(\$0.86)																													
005	Tax	(\$0.11)	\$0.00	(\$0.11)																													
Refund																		\$18.77															
GIANELLI, LAYLA GRACE	GIANELLI, LAYLA GRACE		402 HIGHWAY 218 W		INDIAN TRAIL, NC 28079	Proration	0076749827	KBB3807	AUTHORIZED	751765581	Refund Generated due to proration on Bill #0076749827-2023-2023-0000-00	Vehicle Totalled	10/09/2024	10/10/2024 8:11:45 AM	001	Tax	(\$16.32)	\$0.00	(\$16.32)														
															930	Tax	(\$2.00)	\$0.00	(\$2.00)														
															016	Tax	(\$5.03)	\$0.00	(\$5.03)														
															002	Tax	(\$37.42)	\$0.00	(\$37.42)														
															003	Tax	(\$1.75)	\$0.00	(\$1.75)														
															004	Tax	(\$2.92)	\$0.00	(\$2.92)														
005	Tax	(\$0.39)	\$0.00	(\$0.39)																													
Refund																		\$65.83															
GIROUX, JAMES MICHAEL	GIROUX, JAMES MICHAEL		1025 BREAKMAKER LN		INDIAN TRAIL, NC 28079	Proration	0078789105	VDE7543	AUTHORIZED	751040332	Refund Generated due to proration on Bill #0078789105-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:16:04 AM	001	Tax	(\$53.88)	\$0.00	(\$53.88)														
															600	Tax	(\$61.08)	\$0.00	(\$61.08)														
															023	Tax	(\$14.56)	\$0.00	(\$14.56)														
															002	Tax	(\$123.55)	\$0.00	(\$123.55)														
															003	Tax	(\$5.77)	\$0.00	(\$5.77)														
															004	Tax	(\$9.64)	\$0.00	(\$9.64)														
005	Tax	(\$1.29)	\$0.00	(\$1.29)																													
Refund																		\$269.77															
GITTENS, CHARLESETTA E ALOWINE	GITTENS, CHARLESETTA E ALOWINE		6716 3RD AVE		INDIAN TRAIL, NC 28079	Adjustment < \$100	0080214347	TLP7705	PENDING	966231756	Refund Generated due to adjustment on Bill #0080214347-2023-2023-0000	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00														
															200	Tax	(\$28.34)	\$0.00	(\$28.34)														
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)														
															600	Tax	\$10.43	\$0.00	\$10.43														
															023	Tax	\$2.49	\$0.00	\$2.49														
															002	Tax	\$0.00	\$0.00	\$0.00														
003	Tax	\$0.00	\$0.00	\$0.00																													
004	Tax	\$0.00	\$0.00	\$0.00																													
005	Tax	\$0.00	\$0.00	\$0.00																													
Refund																		\$45.42															
GREGG, JEFFREY THOMAS	GREGG, JEFFREY THOMAS		2753 ROLLING HILLS DR		MONROE, NC 28110	Proration	0017950064	SXL2218	AUTHORIZED	755187356	Refund Generated due to proration on Bill #0017950064-2023-2023-0000-00	Vehicle Sold	10/29/2024	10/30/2024 11:42:27 AM	001	Tax	(\$5.23)	\$0.00	(\$5.23)														
															200	Tax	(\$16.09)	\$0.00	(\$16.09)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$11.98)	\$0.00	(\$11.98)														
															003	Tax	(\$0.56)	\$0.00	(\$0.56)														
															004	Tax	(\$0.94)	\$0.00	(\$0.94)														
005	Tax	(\$0.13)	\$0.00	(\$0.13)																													
Refund																		\$34.93															
GREGG, JULIE BERNICE	GREGG, JULIE BERNICE		2753 ROLLING HILLS DR		MONROE, NC 28110	Proration	0058982170	HHN3978	AUTHORIZED	751040549	Refund Generated due to proration on Bill #0058982170-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:15:43 AM	001	Tax	(\$4.89)	\$0.00	(\$4.89)														
															200	Tax	(\$15.07)	\$0.00	(\$15.07)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$11.22)	\$0.00	(\$11.22)														
															003	Tax	(\$0.52)	\$0.00	(\$0.52)														
															004	Tax	(\$0.87)	\$0.00	(\$0.87)														
005	Tax	(\$0.12)	\$0.00	(\$0.12)																													
Refund																		\$32.69															
GULLEY, DYLAN CHASE	GULLEY, DYLAN CHASE		1612 MAIZE CT		WAXHAW, NC 28173	Adjustment < \$100	0072694902	KAA6302	PENDING	862094240	Refund Generated due to adjustment on Bill #0072694902-2023-2023-0000-00	Over Assessment	10/24/2024		001	Tax	(\$8.58)	\$0.00	(\$8.58)														
															500	Tax	(\$20.24)	\$0.00	(\$20.24)														
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															028	Tax	(\$2.21)	\$0.00	(\$2.21)														
															002	Tax	(\$19.66)	\$0.00	(\$19.66)														
															003	Tax	(\$0.92)	\$0.00	(\$0.92)														
004	Tax	(\$1.53)	\$0.00	(\$1.53)																													
005	Tax	(\$0.21)	\$0.00	(\$0.21)																													
Refund																		\$53.35															
GUTIERREZ CEDENO, VIRGINIA	GUTIERREZ CEDENO, VIRGINIA		805 W FRANKLIN ST		MONROE, NC 28112	Proration	0074075114	VPX5230	AUTHORIZED	750127553	Refund Generated due to proration on Bill #0074075114-2023-2023-0000-00	Vehicle Sold	10/01/2024	10/2/2024 9:25:54 AM	001	Tax	(\$8.01)	\$0.00	(\$8.01)														
															200	Tax	(\$24.67)	\$0.00	(\$24.67)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$18.37)	\$0.00	(\$18.37)														
															003	Tax	(\$0.86)	\$0.00	(\$0.86)														
															004	Tax	(\$1.43)	\$0.00	(\$1.43)														
005	Tax	(\$0.19)	\$0.00	(\$0.19)																													
Refund																		\$53.53															



North Carolina Vehicle Tax System

NCVTS Pending Refund report

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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
GWEHI, NIJAH SIMONE	GWEHI, NIJAH SIMONE		835 WIND CARVED LN		MONROE, NC 28110	Proration	0078901686	LCC1376	AUTHORIZED	753077899	Refund Generated due to proration on Bill #0078901686-2023-2023-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:17:10 AM	001	Tax	(\$20.37)	\$0.00	(\$20.37)
															200	Tax	(\$62.71)	\$0.00	(\$62.71)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$46.70)	\$0.00	(\$46.70)
															003	Tax	(\$2.18)	\$0.00	(\$2.18)
															004	Tax	(\$3.64)	\$0.00	(\$3.64)
005	Tax	(\$0.49)	\$0.00	(\$0.49)															
Refund																			\$136.09
HATFIELD, THOMAS MICHAEL GREGORY	HATFIELD, THOMAS MICHAEL GREGORY		1410 WAXHAW INDIAN TRAIL		WAXHAW, NC 28173	Proration	0072149337	KFF5294	AUTHORIZED	751768283	Refund Generated due to proration on Bill #0072149337-2023-2023-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:14:03 AM	001	Tax	(\$2.72)	(\$0.15)	(\$2.87)
															970	Tax	(\$0.21)	(\$0.01)	(\$0.22)
															026	Tax	(\$0.63)	(\$0.03)	(\$0.66)
															002	Tax	(\$6.24)	(\$0.36)	(\$6.60)
															003	Tax	(\$0.29)	(\$0.02)	(\$0.31)
															004	Tax	(\$0.49)	(\$0.03)	(\$0.52)
005	Tax	(\$0.07)	(\$0.01)	(\$0.08)															
Refund																			\$11.26
HECTOR SERVICES LLC	HECTOR SERVICES LLC		4050 GRIBBLE RD		MATTHEWS, NC 28104	Adjustment < \$100	0080189527	LEA9265	PENDING	966231738	Refund Generated due to adjustment on Bill #0080189527-2024-2024-0000	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$25.02)	\$0.00	(\$25.02)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															600	Tax	\$9.21	\$0.00	\$9.21
															020	Tax	\$2.66	\$0.00	\$2.66
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
															004	Tax	\$0.00	\$0.00	\$0.00
															005	Tax	\$0.00	\$0.00	\$0.00
															Refund				
HEETER, DENNIS SCOTT	HEETER, DENNIS SCOTT		1005 FOREST DR		MARSHVILLE, NC 28103	Proration	0068470708	THR5562	AUTHORIZED	750127539	Refund Generated due to proration on Bill #0068470708-2023-2023-0000-00	Vehicle Sold	10/01/2024	10/2/2024 9:25:54 AM	001	Tax	(\$24.37)	\$0.00	(\$24.37)
															400	Tax	(\$73.16)	\$0.00	(\$73.16)
															018	Tax	(\$10.02)	\$0.00	(\$10.02)
															002	Tax	(\$55.87)	\$0.00	(\$55.87)
															003	Tax	(\$2.61)	\$0.00	(\$2.61)
															004	Tax	(\$4.36)	\$0.00	(\$4.36)
005	Tax	(\$0.58)	\$0.00	(\$0.58)															
Refund																			\$170.97
HELMS, JONATHAN EVAN	HELMS, JONATHAN EVAN		2020 FAULKES CHURCH RD		MARSHVILLE, NC 28103	Proration	0079789730	TZ5216	AUTHORIZED	647566800	Refund Generated due to proration on Bill #0079789730-2024-2024-0000-00	Vehicle Sold	10/30/2024	10/31/2024 8:43:45 AM	001	Tax	(\$29.70)	\$0.00	(\$29.70)
															024	Tax	(\$14.56)	\$0.00	(\$14.56)
															002	Tax	(\$68.09)	\$0.00	(\$68.09)
															003	Tax	(\$3.18)	\$0.00	(\$3.18)
															004	Tax	(\$5.32)	\$0.00	(\$5.32)
															005	Tax	(\$0.71)	\$0.00	(\$0.71)
Refund																			\$121.56
HERNANDEZ PEREDO, REYNA GABRIELA	HERNANDEZ PEREDO, REYNA GABRIELA		2320 41ST ST APT A1		ASTORIA, NY 11105	Proration	0036920300	EDW6750	AUTHORIZED	750584611	Refund Generated due to proration on Bill #0036920300-2023-2023-0000-00	Reg. Out of state	10/02/2024	10/3/2024 8:08:26 AM	001	Tax	(\$7.26)	\$0.00	(\$7.26)
															200	Tax	(\$22.34)	\$0.00	(\$22.34)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$16.64)	\$0.00	(\$16.64)
															003	Tax	(\$0.78)	\$0.00	(\$0.78)
															004	Tax	(\$1.30)	\$0.00	(\$1.30)
005	Tax	(\$0.17)	\$0.00	(\$0.17)															
Refund																			\$48.49
HESSKE, NICHOLAS RICHARD	HESSKE, NICHOLAS RICHARD	HESSKE, JESSICA LATON	10 JUG BROOME RD		MONROE, NC 28112	Proration	0025846509	PFR3095	AUTHORIZED	323378547	Refund Generated due to proration on Bill #0025846509-2022-2022-0000-00	Vehicle Totalled	10/25/2024	10/28/2024 8:22:11 AM	001	Tax	(\$6.59)	\$0.00	(\$6.59)
															014	Tax	(\$0.48)	\$0.00	(\$0.48)
															003	Tax	(\$1.45)	\$0.00	(\$1.45)
Refund																			\$8.52
HICKMAN, JOHN ROSS	HICKMAN, JOHN ROSS		1622 LOOKOUT CIR		WAXHAW, NC 28173	Proration	0043256043	TDC5731	AUTHORIZED	644372454	Refund Generated due to proration on Bill #0043256043-2023-2023-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:15:07 AM	001	Tax	(\$1.03)	\$0.00	(\$1.03)
															026	Tax	(\$0.24)	\$0.00	(\$0.24)
															002	Tax	(\$2.37)	\$0.00	(\$2.37)
															003	Tax	(\$0.11)	\$0.00	(\$0.11)
															004	Tax	(\$0.19)	\$0.00	(\$0.19)
															005	Tax	(\$0.03)	\$0.00	(\$0.03)
Refund																			\$3.97
HILL, ASHLEY MARIE	HILL, ASHLEY MARIE	HILL, MATTHEW LAWRENCE	2015 TRIGGER DR		INDIAN TRAIL, NC 28079	Proration	0066645794	RDW9507	AUTHORIZED	751964661	Refund Generated due to proration on Bill #0066645794-2023-2023-0000-00	Vehicle Sold	10/11/2024	10/16/2024 8:23:22 AM	001	Tax	(\$28.70)	\$0.00	(\$28.70)
															600	Tax	(\$32.53)	\$0.00	(\$32.53)
															023	Tax	(\$7.75)	\$0.00	(\$7.75)
															002	Tax	(\$65.81)	\$0.00	(\$65.81)
															003	Tax	(\$3.07)	\$0.00	(\$3.07)
															004	Tax	(\$5.14)	\$0.00	(\$5.14)
005	Tax	(\$0.68)	\$0.00	(\$0.68)															
Refund																			\$143.68
HILUF, ETSAY TEFERI	HILUF, ETSAY TEFERI		2044 BLUE IRIS DR		MATTHEWS, NC 28104	Proration	0073525016	PKJ5124	AUTHORIZED	753287451	Refund Generated due to proration on Bill #0073525016-2023-2023-0000-00	Vehicle Totalled	10/18/2024	10/21/2024 8:12:16 AM	001	Tax	(\$13.85)	(\$0.69)	(\$14.54)
															700	Tax	(\$15.79)	(\$0.79)	(\$16.58)
															023	Tax	(\$3.74)	(\$0.19)	(\$3.93)
															002	Tax	(\$31.77)	(\$1.59)	(\$33.36)
															003	Tax	(\$1.48)	(\$0.07)	(\$1.55)
															004	Tax	(\$2.48)	(\$0.13)	(\$2.61)
005	Tax	(\$0.33)	(\$0.01)	(\$0.34)															
Refund																			\$72.91



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
HINSON, LAURIN KENNETH	HINSON, LAURIN KENNETH		5909 SUGAR AND WINE RD		MONROE, NC 28110	Proration	0063515399	JDJ1726	AUTHORIZED	642966540	Refund Generated due to proration on Bill #0063515399-2023-2023-0000-00	Vehicle Sold	10/01/2024	10/2/2024 9:25:54 AM	001	Tax	(\$17.28)	\$0.00	(\$17.28)
															017	Tax	(\$4.07)	\$0.00	(\$4.07)
															002	Tax	(\$39.62)	\$0.00	(\$39.62)
															003	Tax	(\$1.85)	\$0.00	(\$1.85)
															004	Tax	(\$3.09)	\$0.00	(\$3.09)
															005	Tax	(\$0.41)	\$0.00	(\$0.41)
Refund																		\$66.32	
HITCH, KEITH ALAN	HITCH, KEITH ALAN		1014 CARLYLE LN		MONROE, NC 28110	Proration	0070253006	DLS1687	AUTHORIZED	646130796	Refund Generated due to proration on Bill #0070253006-2023-2023-0000-00	Vehicle Sold	10/21/2024	10/22/2024 8:10:05 AM	001	Tax	(\$5.76)	\$0.00	(\$5.76)
															026	Tax	(\$1.32)	\$0.00	(\$1.32)
															002	Tax	(\$13.20)	\$0.00	(\$13.20)
															003	Tax	(\$0.62)	\$0.00	(\$0.62)
															004	Tax	(\$1.03)	\$0.00	(\$1.03)
															005	Tax	(\$0.14)	\$0.00	(\$0.14)
Refund																		\$22.07	
HOFFMAN, AMBER LYNN	HOFFMAN, AMBER LYNN	HOFFMAN, BENJAMIN JACOB	6314 CROSSHALL PL		WAXHAW, NC 28173	Proration	0076202488	LAH2731	AUTHORIZED	753852533	Refund Generated due to proration on Bill #0076202488-2023-2023-0000-00	Vehicle Sold	10/22/2024	10/23/2024 10:28:26 AM	001	Tax	(\$2.42)	\$0.00	(\$2.42)
															970	Tax	(\$0.19)	\$0.00	(\$0.19)
															026	Tax	(\$0.56)	\$0.00	(\$0.56)
															002	Tax	(\$5.55)	\$0.00	(\$5.55)
															003	Tax	(\$0.26)	\$0.00	(\$0.26)
															004	Tax	(\$0.43)	\$0.00	(\$0.43)
005	Tax	(\$0.06)	\$0.00	(\$0.06)															
Refund																		\$9.47	
HOLDEFEHR, GEORGE JOSEPH III	HOLDEFEHR, GEORGE JOSEPH III		1608 FUNNY CIDE DR		WAXHAW, NC 28173	Adjustment < \$100	0063439128	JJA6021	PENDING	647566734	Refund Generated due to adjustment on Bill #0063439128-2024-2024-0000-00	Over Assessment	10/30/2024		001	Tax	(\$5.60)	\$0.00	(\$5.60)
															026	Tax	(\$1.37)	\$0.00	(\$1.37)
															002	Tax	(\$12.84)	\$0.00	(\$12.84)
															003	Tax	(\$0.60)	\$0.00	(\$0.60)
															004	Tax	(\$1.00)	\$0.00	(\$1.00)
															005	Tax	(\$0.13)	\$0.00	(\$0.13)
Refund																		\$21.54	
HOLTZSCHUE, ADAM DANIEL	HOLTZSCHUE, ADAM DANIEL		302 ROYAL CRESCENT LN		WAXHAW, NC 28173	Proration	0062006649	DKH2504	AUTHORIZED	645494286	Refund Generated due to proration on Bill #0062006649-2023-2023-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:18:16 AM	001	Tax	(\$37.53)	\$0.00	(\$37.53)
															026	Tax	(\$8.62)	\$0.00	(\$8.62)
															002	Tax	(\$86.07)	\$0.00	(\$86.07)
															003	Tax	(\$4.02)	\$0.00	(\$4.02)
															004	Tax	(\$6.72)	\$0.00	(\$6.72)
															005	Tax	(\$0.90)	\$0.00	(\$0.90)
Refund																		\$143.86	
HOOPAUGH GRADING COMPANYLLC	HOOPAUGH GRADING COMPANYLLC		PO BOX 7727		CHARLOTTE, NC 28241	Proration	0070381736	KAB1886	AUTHORIZED	644541054	Refund Generated due to proration on Bill #0070381736-2023-2023-0000-00	Vehicle Totalled	10/11/2024	10/16/2024 8:23:33 AM	001	Tax	(\$34.68)	\$0.00	(\$34.68)
															023	Tax	(\$9.37)	\$0.00	(\$9.37)
															002	Tax	(\$79.51)	\$0.00	(\$79.51)
															003	Tax	(\$3.72)	\$0.00	(\$3.72)
															004	Tax	(\$6.21)	\$0.00	(\$6.21)
															005	Tax	(\$0.83)	\$0.00	(\$0.83)
Refund																		\$134.32	
HOUGH, RICHARD AARON	HOUGH, RICHARD AARON		4110 ALLENBY PL		MONROE, NC 28110	Proration	0074953969	8J4083	AUTHORIZED	754102874	Refund Generated due to proration on Bill #0074953969-2023-2023-0000-00	Vehicle Sold	10/23/2024	10/24/2024 8:22:09 AM	001	Tax	(\$7.43)	\$0.00	(\$7.43)
															200	Tax	(\$22.89)	\$0.00	(\$22.89)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$17.04)	\$0.00	(\$17.04)
															003	Tax	(\$0.80)	\$0.00	(\$0.80)
															004	Tax	(\$1.33)	\$0.00	(\$1.33)
005	Tax	(\$0.18)	\$0.00	(\$0.18)															
Refund																		\$49.67	
HOUSE, LINDA	HOUSE, LINDA		3302 BROOKTREE LN		INDIAN TRAIL, NC 28079	Proration	0064365155	FLT9623	AUTHORIZED	753289355	Refund Generated due to proration on Bill #0064365155-2023-2023-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:09:58 AM	001	Tax	(\$18.28)	(\$0.92)	(\$19.20)
															600	Tax	(\$20.73)	(\$1.03)	(\$21.76)
															023	Tax	(\$4.94)	(\$0.24)	(\$5.18)
															002	Tax	(\$41.93)	(\$2.10)	(\$44.03)
															003	Tax	(\$1.96)	(\$0.10)	(\$2.06)
															004	Tax	(\$3.27)	(\$0.17)	(\$3.44)
005	Tax	(\$0.43)	(\$0.02)	(\$0.45)															
Refund																		\$96.12	
INTERSTATE OFFICE INSTALLATION LLC	INTERSTATE OFFICE INSTALLATION LLC		546 BALLYMOTE CT		MATTHEWS, NC 28104	Proration	0073592872	VCL7955	AUTHORIZED	751765560	Refund Generated due to proration on Bill #0073592872-2023-2023-0000-00	Vehicle Sold	10/09/2024	10/10/2024 8:11:57 AM	001	Tax	(\$58.95)	\$0.00	(\$58.95)
															700	Tax	(\$67.19)	\$0.00	(\$67.19)
															023	Tax	(\$15.93)	\$0.00	(\$15.93)
															002	Tax	(\$135.17)	\$0.00	(\$135.17)
															003	Tax	(\$6.32)	\$0.00	(\$6.32)
															004	Tax	(\$10.55)	\$0.00	(\$10.55)
005	Tax	(\$1.41)	\$0.00	(\$1.41)															
Refund																		\$295.52	
JOHANSSON, JOHN ERIC	JOHANSSON, JOHN ERIC		7626 PLEASANT HILL CHURCH		MARSHVILLE, NC 28103	Proration	0066762202	JFH3999	AUTHORIZED	644370924	Refund Generated due to proration on Bill #0066762202-2023-2023-0000-00	Vehicle Sold	10/09/2024	10/10/2024 8:11:40 AM	001	Tax	(\$35.97)	\$0.00	(\$35.97)
															017	Tax	(\$8.46)	\$0.00	(\$8.46)
															002	Tax	(\$82.47)	\$0.00	(\$82.47)
															003	Tax	(\$3.86)	\$0.00	(\$3.86)
															004	Tax	(\$6.44)	\$0.00	(\$6.44)
															005	Tax	(\$0.86)	\$0.00	(\$0.86)
Refund																		\$138.06	
JONES, ERVIN MAURICE	JONES, ERVIN MAURICE	JONES, SHARON RENEE	5296 DIGGS RD		MORVEN, NC 28119	Proration	0074170448	TEM6803	AUTHORIZED	430450156	Refund Generated due to proration on Bill #0074170448-2022-2022-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:11:47 AM	001	Tax	(\$11.85)	\$0.00	(\$11.85)
															200	Tax	(\$12.36)	\$0.00	(\$12.36)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															003	Tax	(\$2.61)	\$0.00	(\$2.61)
Refund																		\$26.82	



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
KICHIGIN, ALEXANDR ALEXEEVICH	KICHIGIN, ALEXANDR ALEXEEVICH		2121 HUNTERS TRAIL DR		INDIAN TRAIL, NC 28079	Proration	0079832251	VEB9003	AUTHORIZED	754102846	Refund Generated due to proration on Bill #0079832251-2024-2024-0000-00	Vehicle Sold	10/23/2024	10/24/2024 8:19:03 AM	001	Tax	(\$10.27)	\$0.00	(\$10.27)
															600	Tax	(\$11.64)	\$0.00	(\$11.64)
															023	Tax	(\$3.22)	\$0.00	(\$3.22)
															002	Tax	(\$23.54)	\$0.00	(\$23.54)
															003	Tax	(\$1.10)	\$0.00	(\$1.10)
															004	Tax	(\$1.83)	\$0.00	(\$1.83)
005	Tax	(\$0.24)	\$0.00	(\$0.24)															
Refund																			\$51.84
KIM, YOSEB	KIM, YOSEB		136 ELLISON WAY		MARVIN, NC 28173	Proration	0077067863	KMR3550	AUTHORIZED	863069816	Refund Generated due to proration on Bill #0077067863-2023-2023-0000-00	Vehicle Sold	10/29/2024	10/30/2024 11:43:03 AM	001	Tax	(\$35.75)	\$0.00	(\$35.75)
															101	Tax	(\$13.14)	\$0.00	(\$13.14)
															101	Vehicle Fee	\$0.00	\$0.00	\$0.00
															026	Tax	(\$8.21)	\$0.00	(\$8.21)
															002	Tax	(\$81.97)	\$0.00	(\$81.97)
															003	Tax	(\$3.83)	\$0.00	(\$3.83)
004	Tax	(\$6.40)	\$0.00	(\$6.40)															
005	Tax	(\$0.85)	\$0.00	(\$0.85)															
Refund																			\$150.15
KIRYLENKA, KATSIARYNA	KIRYLENKA, KATSIARYNA		1307 TRULL PL		MONROE, NC 28110	Proration	0070371925	RCS6083	AUTHORIZED	751965410	Refund Generated due to proration on Bill #0070371925-2023-2023-0000-00	Vehicle Sold	10/11/2024	10/16/2024 8:23:07 AM	001	Tax	(\$39.47)	\$0.00	(\$39.47)
															200	Tax	(\$121.54)	\$0.00	(\$121.54)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$90.51)	\$0.00	(\$90.51)
															003	Tax	(\$4.23)	\$0.00	(\$4.23)
															004	Tax	(\$7.06)	\$0.00	(\$7.06)
005	Tax	(\$0.94)	\$0.00	(\$0.94)															
Refund																			\$263.75
KISER, HAILEY BRIANNE	KISER, HAILEY BRIANNE		2020 FAULKS CHURCH RD		MARSHVILLE, NC 28103	Proration	0079261310	VDS1676	AUTHORIZED	647566812	Refund Generated due to proration on Bill #0079261310-2024-2024-0000-00	Vehicle Sold	10/30/2024	10/31/2024 8:43:52 AM	001	Tax	(\$1.36)	\$0.00	(\$1.36)
															024	Tax	(\$0.67)	\$0.00	(\$0.67)
															002	Tax	(\$3.11)	\$0.00	(\$3.11)
															003	Tax	(\$0.14)	\$0.00	(\$0.14)
															004	Tax	(\$0.24)	\$0.00	(\$0.24)
															005	Tax	(\$0.03)	\$0.00	(\$0.03)
Refund																			\$5.55
KNUDSON, BENJAMIN MICHAEL	KNUDSON, BENJAMIN MICHAEL		1407 LONGLEAF CT		MATTHEWS, NC 28104	Proration	0077370305	VCM1248	AUTHORIZED	643358772	Refund Generated due to proration on Bill #0077370305-2023-2023-0000-00	Vehicle Sold	10/02/2024	10/3/2024 8:07:27 AM	001	Tax	(\$12.32)	\$0.00	(\$12.32)
															800	Tax	(\$3.40)	\$0.00	(\$3.40)
															002	Tax	(\$28.25)	\$0.00	(\$28.25)
															003	Tax	(\$1.32)	\$0.00	(\$1.32)
															004	Tax	(\$2.20)	\$0.00	(\$2.20)
															005	Tax	(\$0.29)	\$0.00	(\$0.29)
Refund																			\$47.78
KORNUTA, ALEKSANDR	KORNUTA, ALEKSANDR		1421 AFTERNOON SUN RD		MATTHEWS, NC 28104	Adjustment < \$100	0080647718	VEP3910	PENDING	754330353	Refund Generated due to adjustment on Bill #0080647718-2024-2024-0000-00	SLVG or RBLT TTL	10/24/2024		001	Tax	(\$14.64)	\$0.00	(\$14.64)
															700	Tax	(\$19.38)	\$0.00	(\$19.38)
															020	Tax	(\$4.80)	\$0.00	(\$4.80)
															002	Tax	(\$33.58)	\$0.00	(\$33.58)
															003	Tax	(\$1.57)	\$0.00	(\$1.57)
															004	Tax	(\$2.62)	\$0.00	(\$2.62)
005	Tax	(\$0.35)	\$0.00	(\$0.35)															
Refund																			\$76.94
KOVENDI, SANDOR ATTILA	KOVENDI, SANDOR ATTILA		3919 FOX HOUND LN		WAXHAW, NC 28173	Adjustment < \$100	0080662667	VBA7191	PENDING	647265294	Refund Generated due to adjustment on Bill #0080662667-2024-2024-0000-00	Over Assessment	10/28/2024		001	Tax	(\$2.85)	\$0.00	(\$2.85)
															028	Tax	(\$0.91)	\$0.00	(\$0.91)
															002	Tax	(\$6.53)	\$0.00	(\$6.53)
															003	Tax	(\$0.30)	\$0.00	(\$0.30)
															004	Tax	(\$0.51)	\$0.00	(\$0.51)
															005	Tax	(\$0.07)	\$0.00	(\$0.07)
Refund																			\$11.17
LAND, JENNIFER CARVER	LAND, JENNIFER CARVER		1910 GRIGG LN		WAXHAW, NC 28173	Proration	0075316529	MACHEGT	AUTHORIZED	858331712	Refund Generated due to proration on Bill #0075316529-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:16:30 AM	001	Tax	(\$43.62)	(\$2.18)	(\$45.80)
															101	Tax	(\$16.04)	(\$0.80)	(\$16.84)
															101	Vehicle Fee	\$0.00	\$0.00	\$0.00
															026	Tax	(\$10.02)	(\$0.50)	(\$10.52)
															002	Tax	(\$100.02)	(\$5.00)	(\$105.02)
															003	Tax	(\$4.68)	(\$0.23)	(\$4.91)
004	Tax	(\$7.80)	(\$0.39)	(\$8.19)															
005	Tax	(\$1.04)	(\$0.06)	(\$1.10)															
Refund																			\$192.38
LEARY, JENNIFER MARIE	LEARY, JENNIFER MARIE		504 ARBORVITAVE CT		WAXHAW, NC 28173	Proration	0058717978	JBK7351	AUTHORIZED	857810992	Refund Generated due to proration on Bill #0058717978-2023-2023-0000-00	Vehicle Sold	10/02/2024	10/3/2024 8:08:17 AM	001	Tax	(\$34.91)	\$0.00	(\$34.91)
															101	Tax	(\$12.84)	\$0.00	(\$12.84)
															101	Vehicle Fee	\$0.00	\$0.00	\$0.00
															026	Tax	(\$8.02)	\$0.00	(\$8.02)
															002	Tax	(\$80.05)	\$0.00	(\$80.05)
															003	Tax	(\$3.74)	\$0.00	(\$3.74)
004	Tax	(\$6.25)	\$0.00	(\$6.25)															
005	Tax	(\$0.83)	\$0.00	(\$0.83)															
Refund																			\$146.64
LEVADNUK, DANA CARLTON	LEVADNUK, DANA CARLTON	LEVADNUK, BRODIE JOE	109 GRAHAM HALL CT		MATTHEWS, NC 28104	Proration	0034914930	HMA5775	AUTHORIZED	644178996	Refund Generated due to proration on Bill #0034914930-2023-2023-0000-00	Vehicle Sold	10/08/2024	10/9/2024 8:06:50 AM	001	Tax	(\$2.59)	\$0.00	(\$2.59)
															800	Tax	(\$0.71)	\$0.00	(\$0.71)
															002	Tax	(\$5.95)	\$0.00	(\$5.95)
															003	Tax	(\$0.28)	\$0.00	(\$0.28)
															004	Tax	(\$0.46)	\$0.00	(\$0.46)
															005	Tax	(\$0.06)	\$0.00	(\$0.06)
Refund																			\$10.05



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
LIU, XIANG	LIU, XIANG		1477 CHERRY LAUREL DR		WAXHAW, NC 28173	Proration	0069851582	FLC5315	AUTHORIZED	644180166	Refund Generated due to proration on Bill #0069851582-2023-2023-0000-00	Vehicle Sold	10/08/2024	10/9/2024 8:06:33 AM	001	Tax	(\$10.20)	\$0.00	(\$10.20)
															026	Tax	(\$2.34)	\$0.00	(\$2.34)
															002	Tax	(\$23.39)	\$0.00	(\$23.39)
															003	Tax	(\$1.09)	\$0.00	(\$1.09)
															004	Tax	(\$1.82)	\$0.00	(\$1.82)
															005	Tax	(\$0.24)	\$0.00	(\$0.24)
Refund \$39.08																			
LOPEZ-MOTA, ARMANDO	LOPEZ-MOTA, ARMANDO	MOTA DOMINGUEZ, VERONICA	421 ENGLISH ST		MONROE, NC 28110	Proration	0062665584	HKJ2167	AUTHORIZED	753817134	Refund Generated due to proration on Bill #0062665584-2023-2023-0000-00	Vehicle Totalled	10/21/2024	10/22/2024 8:09:59 AM	001	Tax	(\$5.00)	\$0.00	(\$5.00)
															200	Tax	(\$15.40)	\$0.00	(\$15.40)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$11.47)	\$0.00	(\$11.47)
															003	Tax	(\$0.54)	\$0.00	(\$0.54)
															004	Tax	(\$0.89)	\$0.00	(\$0.89)
005	Tax	(\$0.12)	\$0.00	(\$0.12)															
Refund \$33.42																			
LOUISE ANN WELCHONS REVOCABLE TRUSTR U/A 08/28/2002	LOUISE ANN WELCHONS REVOCABLE TRUSTR U/A 08/28/2002	WELCHONS, LOUISE ANN	2520 MOUNTAIN FOLK LN		WAXHAW, NC 28173	Adjustment < \$100	0076089317	LAH2929	PENDING	858099192	Refund Generated due to adjustment on Bill #0076089317-2023-2023-0000	Situs error	10/03/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$61.91)	\$0.00	(\$61.91)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															028	Tax	\$5.16	\$0.00	\$5.16
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund \$86.75																			
LYASHENKO, OLEG ALEKSANDRO VICH	LYASHENKO, OLEG ALEKSANDRO VICH		4710 OLD PAGELAND	MARSHVILLE RD	MONROE, NC 28112	Proration	0079594462	VDS1870	AUTHORIZED	644372442	Refund Generated due to proration on Bill #0079594462-2024-2024-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:14:56 AM	001	Tax	(\$5.64)	\$0.00	(\$5.64)
															027	Tax	(\$2.27)	\$0.00	(\$2.27)
															002	Tax	(\$12.94)	\$0.00	(\$12.94)
															003	Tax	(\$0.61)	\$0.00	(\$0.61)
															004	Tax	(\$1.01)	\$0.00	(\$1.01)
															005	Tax	(\$0.13)	\$0.00	(\$0.13)
Refund \$22.80																			
LYMN, JOHN ALBERT CLARENCE	LYMN, JOHN ALBERT CLARENCE		5820 MARKET WAY DR	APT 2404	CHARLOTTE, NC 28277	Proration	0077943848	VAE5386	AUTHORIZED	643573428	Refund Generated due to proration on Bill #0077943848-2023-2023-0000-00	Vehicle Sold	10/03/2024	10/4/2024 2:28:20 PM	001	Tax	(\$32.86)	\$0.00	(\$32.86)
															028	Tax	(\$8.43)	\$0.00	(\$8.43)
															002	Tax	(\$75.34)	\$0.00	(\$75.34)
															003	Tax	(\$3.52)	\$0.00	(\$3.52)
															004	Tax	(\$5.87)	\$0.00	(\$5.87)
															005	Tax	(\$0.78)	\$0.00	(\$0.78)
Refund \$126.80																			
MADDOX, HEATHER PRICE	MADDOX, HEATHER PRICE		PO BOX 42		MARSHVILLE, NC 28103	Proration	0058549609	EJX2493	AUTHORIZED	752852212	Refund Generated due to proration on Bill #0058549609-2023-2023-0000-00	Vehicle Totalled	10/16/2024	10/17/2024 8:35:36 AM	001	Tax	(\$3.65)	\$0.00	(\$3.65)
															400	Tax	(\$10.95)	\$0.00	(\$10.95)
															018	Tax	(\$1.50)	\$0.00	(\$1.50)
															002	Tax	(\$8.36)	\$0.00	(\$8.36)
															003	Tax	(\$0.39)	\$0.00	(\$0.39)
															004	Tax	(\$0.65)	\$0.00	(\$0.65)
005	Tax	(\$0.08)	\$0.00	(\$0.08)															
Refund \$25.58																			
MAHAFFEY, JONAH WILLIAM	MAHAFFEY, JONAH WILLIAM		6516 STEVENS MILL RD		MATTHEWS, NC 28104	Adjustment < \$100	0080006472	LDF7284	PENDING	858872576	Refund Generated due to adjustment on Bill #0080006472-2024-2024-0000	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$59.30)	\$0.00	(\$59.30)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															023	Tax	\$6.04	\$0.00	\$6.04
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund \$83.26																			
MARABUNTA AUTO PARTS	MARABUNTA AUTO PARTS		8000 FOUNTAINBRO OK DR		INDIAN TRAIL, NC 28079	Proration	0066086206	TKR8518	AUTHORIZED	750585710	Refund Generated due to proration on Bill #0066086206-2023-2023-0000-00	Vehicle Sold	10/02/2024	10/3/2024 8:07:18 AM	001	Tax	(\$6.00)	\$0.00	(\$6.00)
															600	Tax	(\$6.81)	\$0.00	(\$6.81)
															019	Tax	(\$1.92)	\$0.00	(\$1.92)
															002	Tax	(\$13.77)	\$0.00	(\$13.77)
															003	Tax	(\$0.64)	\$0.00	(\$0.64)
															004	Tax	(\$1.07)	\$0.00	(\$1.07)
005	Tax	(\$0.14)	\$0.00	(\$0.14)															
Refund \$30.35																			
MARRYAT, GLENN HAROLD	MARRYAT, GLENN HAROLD		3303 THAYER DR		WAXHAW, NC 28173	Proration	0070319911	HJA7578	AUTHORIZED	860660696	Refund Generated due to proration on Bill #0070319911-2023-2023-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:17:02 AM	001	Tax	(\$14.59)	\$0.00	(\$14.59)
															500	Tax	(\$34.43)	\$0.00	(\$34.43)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$3.74)	\$0.00	(\$3.74)
															002	Tax	(\$33.46)	\$0.00	(\$33.46)
															003	Tax	(\$1.56)	\$0.00	(\$1.56)
004	Tax	(\$2.61)	\$0.00	(\$2.61)															
005	Tax	(\$0.35)	\$0.00	(\$0.35)															
Refund \$90.74																			
MASSENGILL, JOE HOLLIS	MASSENGILL, JOE HOLLIS		1080 STONEDOWN LN		MATTHEWS, NC 28104	Proration	0063971665	JAW6234	AUTHORIZED	753077388	Refund Generated due to proration on Bill #0063971665-2023-2023-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:02:48 AM	001	Tax	(\$19.74)	\$0.00	(\$19.74)
															700	Tax	(\$22.50)	\$0.00	(\$22.50)
															020	Tax	(\$5.78)	\$0.00	(\$5.78)
															002	Tax	(\$45.27)	\$0.00	(\$45.27)
															003	Tax	(\$2.12)	\$0.00	(\$2.12)
															004	Tax	(\$3.53)	\$0.00	(\$3.53)
005	Tax	(\$0.47)	\$0.00	(\$0.47)															
Refund \$99.41																			



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
MATASIC, DAWN MARIE	MATASIC, DAWN MARIE		705 CLIFDEN DR		MATTHEWS, NC 28104	Proration	0057161421	PKZ9737	AUTHORIZED	751040276	Refund Generated due to proration on Bill #0057161421-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:16:22 AM	001	Tax	(\$8.81)	\$0.00	(\$8.81)
															700	Tax	(\$10.04)	\$0.00	(\$10.04)
															023	Tax	(\$2.38)	\$0.00	(\$2.38)
															002	Tax	(\$20.19)	\$0.00	(\$20.19)
															003	Tax	(\$0.94)	\$0.00	(\$0.94)
															004	Tax	(\$1.57)	\$0.00	(\$1.57)
005	Tax	(\$0.21)	\$0.00	(\$0.21)															
Refund																			\$44.14
MAULDIN, AUSTIN EUGENE	MAULDIN, AUSTIN EUGENE		1110 CLARKSVILLE CAMPGROUN DR		MONROE, NC 28112	Adjustment < \$100	0080403964	VBA6870	PENDING	858872976	Refund Generated due to adjustment on Bill #0080403964-2024-2024-0000	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$9.60)	\$0.00	(\$9.60)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															029	Tax	\$0.71	\$0.00	\$0.71
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$38.89
MCCRADY, MARGARET ELIZABETH	MCCRADY, MARGARET ELIZABETH	VREDENBURG, CASEY ROBERT	1831 WINFIELD DR		MONROE, NC 28110	Proration	0072794044	EDN4255	AUTHORIZED	753287577	Refund Generated due to proration on Bill #0072794044-2023-2023-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:11:58 AM	001	Tax	(\$19.41)	\$0.00	(\$19.41)
															200	Tax	(\$59.78)	\$0.00	(\$59.78)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$44.52)	\$0.00	(\$44.52)
															003	Tax	(\$2.08)	\$0.00	(\$2.08)
															004	Tax	(\$3.47)	\$0.00	(\$3.47)
005	Tax	(\$0.47)	\$0.00	(\$0.47)															
Refund																			\$129.73
MCCUTCHEON, WALTER DENNIS	MCCUTCHEON, WALTER DENNIS		2114 FLETCHER BROOME RD		MONROE, NC 28112	Proration	0079621252	RDW2015	AUTHORIZED	644372280	Refund Generated due to proration on Bill #0079621252-2024-2024-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:14:29 AM	001	Tax	(\$2.39)	\$0.00	(\$2.39)
															015	Tax	(\$0.81)	\$0.00	(\$0.81)
															002	Tax	(\$5.49)	\$0.00	(\$5.49)
															003	Tax	(\$0.29)	\$0.00	(\$0.29)
															004	Tax	(\$0.42)	\$0.00	(\$0.42)
															005	Tax	(\$0.06)	\$0.00	(\$0.06)
Refund																			\$9.43
MCLAMB, MILTON BRIAN	MCLAMB, MILTON BRIAN		1622 PRICE RD		INDIAN TRAIL, NC 28079	Proration	0079368855	RJC5700	AUTHORIZED	645494796	Refund Generated due to proration on Bill #0079368855-2024-2024-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:17:52 AM	001	Tax	(\$6.12)	\$0.00	(\$6.12)
															021	Tax	(\$2.54)	\$0.00	(\$2.54)
															002	Tax	(\$14.03)	\$0.00	(\$14.03)
															003	Tax	(\$0.66)	\$0.00	(\$0.66)
															004	Tax	(\$1.09)	\$0.00	(\$1.09)
															005	Tax	(\$0.15)	\$0.00	(\$0.15)
Refund																			\$24.59
MEADERS, LEVANDER RAYNARD	MEADERS, LEVANDER RAYNARD		1233 S FOREST HILLS SCHOOL RD		MARSHVILLE, NC 28103	Adjustment < \$100	0080110595	VAY6289	PENDING	858872488	Refund Generated due to adjustment on Bill #0080110595-2023-2023-0000	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$5.18)	\$0.00	(\$5.18)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															018	Tax	\$0.69	\$0.00	\$0.69
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$34.49
METZ, DOUGLAS LEE	METZ, DOUGLAS LEE		2115 FLAGSTICK DR		MATTHEWS, NC 28104	Proration	0078898242	LCD4651	AUTHORIZED	755494565	Refund Generated due to proration on Bill #0078898242-2023-2023-0000-00	Vehicle Sold	10/30/2024	10/31/2024 8:44:00 AM	001	Tax	(\$63.54)	\$0.00	(\$63.54)
															700	Tax	(\$72.41)	\$0.00	(\$72.41)
															023	Tax	(\$17.17)	\$0.00	(\$17.17)
															002	Tax	(\$145.69)	\$0.00	(\$145.69)
															003	Tax	(\$6.81)	\$0.00	(\$6.81)
															004	Tax	(\$11.37)	\$0.00	(\$11.37)
005	Tax	(\$1.52)	\$0.00	(\$1.52)															
Refund																			\$318.51
MILLER, JULIA CHRISTOPHER	MILLER, JULIA CHRISTOPHER		4333 FOREST SPGS DR		MINERAL SPRINGS, NC 28108	Adjustment < \$100	0080063793	RJL6702	PENDING	966230964	Refund Generated due to adjustment on Bill #0080063793-2024-2024-0000	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$27.69)	\$0.00	(\$27.69)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															990	Tax	\$1.16	\$0.00	\$1.16
															015	Tax	\$3.04	\$0.00	\$3.04
															002	Tax	\$0.00	\$0.00	\$0.00
003	Tax	\$0.00	\$0.00	\$0.00															
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$53.49
MOREE, JESSE TODD	MOREE, JESSE TODD		4903 CHRISTOPHER RUN DR		MONROE, NC 28112	Proration	0078018826	LBM2667	AUTHORIZED	644373564	Refund Generated due to proration on Bill #0078018826-2023-2023-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:12:43 AM	001	Tax	(\$62.69)	\$0.00	(\$62.69)
															029	Tax	(\$12.64)	\$0.00	(\$12.64)
															002	Tax	(\$143.74)	\$0.00	(\$143.74)
															003	Tax	(\$6.72)	\$0.00	(\$6.72)
															004	Tax	(\$11.22)	\$0.00	(\$11.22)
															005	Tax	(\$1.50)	\$0.00	(\$1.50)
Refund																			\$238.51



North Carolina Vehicle Tax System

NCVTS Pending Refund report

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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
MORGAN, DAVID BROCK	MORGAN, DAVID BROCK		1003 STONEY FORD LN		INDIAN TRAIL, NC 28079	Proration	0077611495	LAD1337	AUTHORIZED	751768955	Refund Generated due to proration on Bill #0077611495-2023-2023-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:12:55 AM	001	Tax	(\$30.82)	\$0.00	(\$30.82)
															600	Tax	(\$34.93)	\$0.00	(\$34.93)
															026	Tax	(\$7.08)	\$0.00	(\$7.08)
															002	Tax	(\$70.65)	\$0.00	(\$70.65)
															003	Tax	(\$3.30)	\$0.00	(\$3.30)
															004	Tax	(\$5.51)	\$0.00	(\$5.51)
005	Tax	(\$0.73)	\$0.00	(\$0.73)															
Refund																			\$153.02
MULLINS, LUCAS WADE	MULLINS, LUCAS WADE	WILLIAMS, MICHAEL SCOTT	1350 MAPLE SHADE LN		CHARLOTTE, NC 28270	Proration	0074002713	HCS5936	AUTHORIZED	860401856	Refund Generated due to proration on Bill #0074002713-2023-2023-0000-00	Vehicle Sold	10/16/2024	10/17/2024 8:46:47 AM	001	Tax	(\$14.23)	\$0.00	(\$14.23)
															500	Tax	(\$33.56)	\$0.00	(\$33.56)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$3.65)	\$0.00	(\$3.65)
															002	Tax	(\$32.61)	\$0.00	(\$32.61)
															003	Tax	(\$1.52)	\$0.00	(\$1.52)
004	Tax	(\$2.55)	\$0.00	(\$2.55)															
005	Tax	(\$0.34)	\$0.00	(\$0.34)															
Refund																			\$88.46
MULLIS, KATHY GRIMES	MULLIS, BRENT EDMOND		3523 E LAWYERS RD		MONROE, NC 28110	Proration	0058524765	HD2149L	AUTHORIZED	643358208	Refund Generated due to proration on Bill #0058524765-2023-2023-0000-00	Vehicle Sold	10/02/2024	10/3/2024 8:08:42 AM	001	Tax	(\$2.00)	\$0.00	(\$2.00)
															021	Tax	(\$0.75)	\$0.00	(\$0.75)
															002	Tax	(\$4.60)	\$0.00	(\$4.60)
															003	Tax	(\$0.22)	\$0.00	(\$0.22)
															004	Tax	(\$0.36)	\$0.00	(\$0.36)
															005	Tax	(\$0.05)	\$0.00	(\$0.05)
Refund																			\$7.98
NASH COMPANY INC	NASH COMPANY INC		322 JACK DAVIS RD		MONROE, NC 28112	Proration	0075375625	FEJ9721	AUTHORIZED	645301158	Refund Generated due to proration on Bill #0075375625-2023-2023-0000-00	Vehicle Sold	10/16/2024	10/17/2024 8:36:13 AM	001	Tax	(\$19.11)	\$0.00	(\$19.11)
															014	Tax	(\$4.07)	\$0.00	(\$4.07)
															002	Tax	(\$43.81)	\$0.00	(\$43.81)
															003	Tax	(\$2.05)	\$0.00	(\$2.05)
															004	Tax	(\$3.42)	\$0.00	(\$3.42)
															005	Tax	(\$0.46)	\$0.00	(\$0.46)
Refund																			\$72.92
NASIATKA, CALEB JOHN	NASIATKA, CALEB JOHN		PO BOX 248		WAXHAW, NC 28173	Adjustment < \$100	0080031244	LDP2104	PENDING	858872496	Refund Generated due to adjustment on Bill #0080031244-2024-2024-0000	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$4.02)	\$0.00	(\$4.02)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															028	Tax	\$0.42	\$0.00	\$0.42
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$33.60
NEAL, JASON TODD	NEAL, JASON TODD		2063 WEDDINGTON LAKE DR		MATTHEWS, NC 28104	Proration	0078258071	VCL8897	AUTHORIZED	646160118	Refund Generated due to proration on Bill #0078258071-2023-2023-0000-00	Vehicle Totalled	10/22/2024	10/23/2024 10:28:17 AM	001	Tax	(\$11.62)	\$0.00	(\$11.62)
															800	Tax	(\$3.21)	\$0.00	(\$3.21)
															002	Tax	(\$26.66)	\$0.00	(\$26.66)
															003	Tax	(\$1.24)	\$0.00	(\$1.24)
															004	Tax	(\$2.08)	\$0.00	(\$2.08)
															005	Tax	(\$0.28)	\$0.00	(\$0.28)
Refund																			\$45.09
NGUYEN, WES NINH	NGUYEN, WES NINH		203 BELVEDERE LN		WAXHAW, NC 28173	Proration	0053904844	HDC5366	AUTHORIZED	646757106	Refund Generated due to proration on Bill #0053904844-2023-2023-0000-00	Vehicle Sold	10/25/2024	10/28/2024 8:22:01 AM	001	Tax	(\$32.09)	\$0.00	(\$32.09)
															026	Tax	(\$7.37)	\$0.00	(\$7.37)
															002	Tax	(\$73.58)	\$0.00	(\$73.58)
															003	Tax	(\$3.44)	\$0.00	(\$3.44)
															004	Tax	(\$5.74)	\$0.00	(\$5.74)
															005	Tax	(\$0.77)	\$0.00	(\$0.77)
Refund																			\$122.99
NIKITINA, OKSANA STANISLAVOV NA	NIKITINA, OKSANA STANISLAVOV NA		1101 EMILY LN		MONROE, NC 28110	Proration	0055816419	JCC5761	AUTHORIZED	755144502	Refund Generated due to proration on Bill #0055816419-2023-2023-0000-00	Vehicle Totalled	10/28/2024	10/29/2024 8:06:26 AM	001	Tax	(\$2.66)	\$0.00	(\$2.66)
															200	Tax	(\$8.19)	\$0.00	(\$8.19)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$6.10)	\$0.00	(\$6.10)
															003	Tax	(\$0.28)	\$0.00	(\$0.28)
															004	Tax	(\$0.47)	\$0.00	(\$0.47)
005	Tax	(\$0.06)	\$0.00	(\$0.06)															
Refund																			\$17.76
NUNN, CLARENCE LYNN	NUNN, CLARENCE LYNN		8710 CHEWTON GLEN DR		WAXHAW, NC 28173	Proration	0075267463	KMC9370	AUTHORIZED	645675168	Refund Generated due to proration on Bill #0075267463-2023-2023-0000-00	Vehicle Totalled	10/18/2024	10/21/2024 8:11:31 AM	001	Tax	(\$85.78)	\$0.00	(\$85.78)
															026	Tax	(\$19.71)	\$0.00	(\$19.71)
															002	Tax	(\$196.68)	\$0.00	(\$196.68)
															003	Tax	(\$9.20)	\$0.00	(\$9.20)
															004	Tax	(\$15.35)	\$0.00	(\$15.35)
															005	Tax	(\$2.05)	\$0.00	(\$2.05)
Refund																			\$328.77
NUNN, CLARENCE LYNN	NUNN, CLARENCE LYNN		8710 CHEWTON GLEN DR		WAXHAW, NC 28173	Proration	0059321822	HJB8421	AUTHORIZED	645675180	Refund Generated due to proration on Bill #0059321822-2023-2023-0000-00	Vehicle Totalled	10/18/2024	10/21/2024 8:11:31 AM	001	Tax	(\$32.47)	\$0.00	(\$32.47)
															026	Tax	(\$7.46)	\$0.00	(\$7.46)
															002	Tax	(\$74.43)	\$0.00	(\$74.43)
															003	Tax	(\$3.48)	\$0.00	(\$3.48)
															004	Tax	(\$5.81)	\$0.00	(\$5.81)
															005	Tax	(\$0.77)	\$0.00	(\$0.77)
Refund																			\$124.42



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
NUNN, CLARENCE LYNN	NUNN, CLARENCE LYNN		8710 CHEWTON GLEN DR		WAXHAW, NC 28173	Proration	0072683912	IKN0WTHX	AUTHORIZED	645675186	Refund Generated due to proration on Bill #0072683912-2023-0000-00	Vehicle Totalled	10/18/2024	10/21/2024 8:11:31 AM	001	Tax	(\$632.26)	\$0.00	(\$632.26)
															026	Tax	(\$145.28)	\$0.00	(\$145.28)
															002	Tax	(\$1,449.70)	\$0.00	(\$1,449.70)
															003	Tax	(\$67.80)	\$0.00	(\$67.80)
															004	Tax	(\$113.12)	\$0.00	(\$113.12)
															005	Tax	(\$15.11)	\$0.00	(\$15.11)
Refund																			\$2423.27
OLIVER, JOSEPH ALLEN	OLIVER, JOSEPH ALLEN		204 ALTON WOODS RD		MONROE, NC 28112	Adjustment < \$100	0080399749	VBA6925	PENDING	858872944	Refund Generated due to adjustment on Bill #0080399749-2024-0000	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$10.65)	\$0.00	(\$10.65)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															029	Tax	\$0.79	\$0.00	\$0.79
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$39.86
OUELLETTE, BRIAN ROLAND	OUELLETTE, BRIAN ROLAND	STEELE, YVONNE SUSAN	2102 OVERWOODS LN		INDIAN TRAIL, NC 28079	Proration	0073272701	RAN2050	AUTHORIZED	753852519	Refund Generated due to proration on Bill #0073272701-2024-0000-00	Vehicle Sold	10/22/2024	10/23/2024 10:28:31 AM	001	Tax	(\$19.96)	\$0.00	(\$19.96)
															600	Tax	(\$22.63)	\$0.00	(\$22.63)
															026	Tax	(\$4.87)	\$0.00	(\$4.87)
															002	Tax	(\$45.76)	\$0.00	(\$45.76)
															003	Tax	(\$2.14)	\$0.00	(\$2.14)
															004	Tax	(\$3.57)	\$0.00	(\$3.57)
005	Tax	(\$0.48)	\$0.00	(\$0.48)															
Refund																			\$99.41
OUTLAND, BRIAN LOUIS	OUTLAND, BRIAN LOUIS		2004 WHPCORD DR		WAXHAW, NC 28173	Proration	0075650634	KCV3282	AUTHORIZED	859389064	Refund Generated due to proration on Bill #0075650634-2023-0000-00	Vehicle Sold	10/11/2024	10/16/2024 8:23:01 AM	001	Tax	(\$9.25)	(\$0.48)	(\$9.73)
															500	Tax	(\$21.82)	(\$1.09)	(\$22.91)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$2.37)	(\$0.11)	(\$2.48)
															002	Tax	(\$21.20)	(\$1.06)	(\$22.26)
															003	Tax	(\$0.99)	(\$0.05)	(\$1.04)
004	Tax	(\$1.65)	(\$0.08)	(\$1.73)															
005	Tax	(\$0.22)	(\$0.01)	(\$0.23)															
Refund																			\$60.38
OWEN, ANGELA RENEE	OWEN, ANGELA RENEE		6310 PLEASANT GROVE RD		WAXHAW, NC 28173	Proration	0079777250	VDS1971	AUTHORIZED	751767681	Refund Generated due to proration on Bill #0079777250-2024-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:14:18 AM	001	Tax	(\$6.20)	\$0.00	(\$6.20)
															990	Tax	(\$0.80)	\$0.00	(\$0.80)
															015	Tax	(\$2.10)	\$0.00	(\$2.10)
															002	Tax	(\$14.22)	\$0.00	(\$14.22)
															003	Tax	(\$0.67)	\$0.00	(\$0.67)
															004	Tax	(\$1.11)	\$0.00	(\$1.11)
005	Tax	(\$0.15)	\$0.00	(\$0.15)															
Refund																			\$25.25
PADGETT, MERCEDES JANAY	PADGETT, MERCEDES JANAY	PADGETT, STEDMAN CORDARRELO	1121 GAINSBOROU GH DR		MATTHEWS, NC 28104	Proration	0078611953	KHB5145	AUTHORIZED	753289341	Refund Generated due to proration on Bill #0078611953-2023-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:10:06 AM	001	Tax	(\$31.25)	\$0.00	(\$31.25)
															700	Tax	(\$35.62)	\$0.00	(\$35.62)
															020	Tax	(\$9.15)	\$0.00	(\$9.15)
															002	Tax	(\$71.66)	\$0.00	(\$71.66)
															003	Tax	(\$3.35)	\$0.00	(\$3.35)
															004	Tax	(\$5.59)	\$0.00	(\$5.59)
005	Tax	(\$0.75)	\$0.00	(\$0.75)															
Refund																			\$157.37
PADGETT, STEDMAN CORDARRELO	PADGETT, STEDMAN CORDARRELO	PADGETT, MERCEDES JANAY	1121 GAINSBOROU GH DR		MATTHEWS, NC 28104	Proration	0079224598	LBH9893	AUTHORIZED	753078088	Refund Generated due to proration on Bill #0079224598-2024-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:16:54 AM	001	Tax	(\$37.15)	\$0.00	(\$37.15)
															700	Tax	(\$49.18)	\$0.00	(\$49.18)
															020	Tax	(\$12.18)	\$0.00	(\$12.18)
															002	Tax	(\$85.20)	\$0.00	(\$85.20)
															003	Tax	(\$3.98)	\$0.00	(\$3.98)
															004	Tax	(\$6.64)	\$0.00	(\$6.64)
005	Tax	(\$0.88)	\$0.00	(\$0.88)															
Refund																			\$195.21
PARKER, MELISSA GENEVA	PARKER, MELISSA GENEVA		1203 E FRANKLIN ST		MONROE, NC 28112	Proration	0072055548	HD3687P	AUTHORIZED	750127623	Refund Generated due to proration on Bill #0072055548-2023-0000-00	Vehicle Sold	10/01/2024	10/2/2024 9:25:54 AM	001	Tax	(\$28.36)	\$0.00	(\$28.36)
															200	Tax	(\$87.32)	\$0.00	(\$87.32)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$65.02)	\$0.00	(\$65.02)
															003	Tax	(\$3.04)	\$0.00	(\$3.04)
															004	Tax	(\$5.08)	\$0.00	(\$5.08)
005	Tax	(\$0.67)	\$0.00	(\$0.67)															
Refund																			\$189.49
PARRA, JOHNY ALEJANDRO	PARRA, JOHNY ALEJANDRO		674 COTTONFIELD CIR		WAXHAW, NC 28173	Proration	0071781467	RES4294	AUTHORIZED	645301398	Refund Generated due to proration on Bill #0071781467-2023-0000-00	Vehicle Sold	10/16/2024	10/17/2024 8:35:44 AM	001	Tax	(\$13.86)	\$0.00	(\$13.86)
															800	Tax	(\$3.82)	\$0.00	(\$3.82)
															002	Tax	(\$31.78)	\$0.00	(\$31.78)
															003	Tax	(\$1.49)	\$0.00	(\$1.49)
															004	Tax	(\$2.48)	\$0.00	(\$2.48)
															005	Tax	(\$0.33)	\$0.00	(\$0.33)
Refund																			\$53.76
PATEL, KIRANBHAI K	PATEL, KIRANBHAI K	PATEL, LILAVATIBEN KIRANBHAI	2016 FRIPP LN		INDIAN TRAIL, NC 28079	Proration	0025736503	JCC2943	AUTHORIZED	754549747	Refund Generated due to proration on Bill #0025736503-2023-0000-00	Vehicle Sold	10/25/2024	10/28/2024 8:10:05 AM	001	Tax	(\$6.66)	\$0.00	(\$6.66)
															600	Tax	(\$7.55)	\$0.00	(\$7.55)
															019	Tax	(\$2.13)	\$0.00	(\$2.13)
															002	Tax	(\$15.28)	\$0.00	(\$15.28)
															003	Tax	(\$0.71)	\$0.00	(\$0.71)
															004	Tax	(\$1.19)	\$0.00	(\$1.19)
005	Tax	(\$0.16)	\$0.00	(\$0.16)															
Refund																			\$33.68



North Carolina Vehicle Tax System

NCVTS Pending Refund report

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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
PEIRANO, JANET CUSAWO	PEIRANO, JANET CUSAWO		3520 HONEYSUCKLE DR		MATTHEWS, NC 28104	Proration	0058945870	HFJ6687	AUTHORIZED	643574166	Refund Generated due to proration on Bill #0058945870-2023-2023-0000-00	Vehicle Totaled	10/03/2024	10/4/2024 2:26:47 PM	001	Tax	(\$12.33)	\$0.00	(\$12.33)
															800	Tax	(\$3.40)	\$0.00	(\$3.40)
															002	Tax	(\$28.27)	\$0.00	(\$28.27)
															003	Tax	(\$1.32)	\$0.00	(\$1.32)
															004	Tax	(\$2.20)	\$0.00	(\$2.20)
															005	Tax	(\$0.30)	\$0.00	(\$0.30)
Refund																			\$47.82
PHAM, NORMAN HUYNH	PHAM, NORMAN HUYNH		1139 HAWTHORNE DR		INDIAN TRAIL, NC 28079	Proration	0079508444	FFH4939	AUTHORIZED	750835960	Refund Generated due to proration on Bill #0079508444-2023-2023-0000-00	Vehicle Sold	10/03/2024	10/4/2024 2:27:05 PM	001	Tax	(\$29.05)	\$0.00	(\$29.05)
															700	Tax	(\$33.10)	\$0.00	(\$33.10)
															023	Tax	(\$7.84)	\$0.00	(\$7.84)
															002	Tax	(\$66.60)	\$0.00	(\$66.60)
															003	Tax	(\$3.11)	\$0.00	(\$3.11)
															004	Tax	(\$5.20)	\$0.00	(\$5.20)
005	Tax	(\$0.70)	\$0.00	(\$0.70)															
Refund																			\$145.60
PHILLIPS, DUKE JOHN JR	PHILLIPS, DUKE JOHN JR		2900 BARNARD CASTLE LN		MATTHEWS, NC 28104	Proration	0079585974	VDX3110	AUTHORIZED	755187377	Refund Generated due to proration on Bill #0079585974-2024-2024-0000-00	Vehicle Sold	10/29/2024	10/30/2024 11:42:19 AM	001	Tax	(\$50.27)	\$0.00	(\$50.27)
															700	Tax	(\$66.52)	\$0.00	(\$66.52)
															020	Tax	(\$16.47)	\$0.00	(\$16.47)
															002	Tax	(\$115.25)	\$0.00	(\$115.25)
															003	Tax	(\$5.39)	\$0.00	(\$5.39)
															004	Tax	(\$8.99)	\$0.00	(\$8.99)
005	Tax	(\$1.20)	\$0.00	(\$1.20)															
Refund																			\$264.09
PRESSLY ANIMAL HOSPITAL LLC	PRESSLY ANIMAL HOSPITAL LLC		301 CHESTNUT LN		MATTHEWS, NC 28104	Proration	0078195007	LAY2247	AUTHORIZED	751040794	Refund Generated due to proration on Bill #0078195007-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:15:32 AM	001	Tax	(\$127.36)	\$0.00	(\$127.36)
															600	Tax	(\$144.37)	\$0.00	(\$144.37)
															020	Tax	(\$37.30)	\$0.00	(\$37.30)
															002	Tax	(\$292.03)	\$0.00	(\$292.03)
															003	Tax	(\$13.66)	\$0.00	(\$13.66)
															004	Tax	(\$22.79)	\$0.00	(\$22.79)
005	Tax	(\$3.04)	\$0.00	(\$3.04)															
Refund																			\$640.55
RAIOLA, ERNESTO	RAIOLA, ERNESTO		240 RAIN TREE DR		MATTHEWS, NC 28104	Proration	0068196446	FLV4165	AUTHORIZED	753077591	Refund Generated due to proration on Bill #0068196446-2023-2023-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:17:30 AM	001	Tax	(\$3.23)	\$0.00	(\$3.23)
															600	Tax	(\$3.67)	\$0.00	(\$3.67)
															020	Tax	(\$0.95)	\$0.00	(\$0.95)
															002	Tax	(\$7.41)	\$0.00	(\$7.41)
															003	Tax	(\$0.35)	\$0.00	(\$0.35)
															004	Tax	(\$0.58)	\$0.00	(\$0.58)
005	Tax	(\$0.08)	\$0.00	(\$0.08)															
Refund																			\$16.27
RAMIREZ SUCHITE, MARVIN ANTONIO	RAMIREZ SUCHITE, MARVIN ANTONIO		1504 OLD HIGHWAY 74		MARSHVILLE, NC 28103	Adjustment < \$100	0080301479	LCX7286	PENDING	858872832	Refund Generated due to adjustment on Bill #0080301479-2024-2024-0000	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$8.89)	\$0.00	(\$8.89)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															018	Tax	\$1.30	\$0.00	\$1.30
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$37.59
RIAD, GEORGE SEROUR SOLIMAN	RIAD, GEORGE SEROUR SOLIMAN		2112 GLENHAVEN DR		WAXHAW, NC 28173	Proration	0076332946	ZM2899	AUTHORIZED	858332416	Refund Generated due to proration on Bill #0076332946-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:15:17 AM	001	Tax	(\$59.71)	\$0.00	(\$59.71)
															500	Tax	(\$140.86)	\$0.00	(\$140.86)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$15.33)	\$0.00	(\$15.33)
															002	Tax	(\$136.91)	\$0.00	(\$136.91)
															003	Tax	(\$6.40)	\$0.00	(\$6.40)
004	Tax	(\$10.68)	\$0.00	(\$10.68)															
005	Tax	(\$1.43)	\$0.00	(\$1.43)															
Refund																			\$371.32
RISHER INCORPORATED	RISHER INCORPORATED		102 WAXHAW PROFESSIONAL	PARK STE D-100	WAXHAW, NC 28173	Adjustment < \$100	0080074312	LDP2291	PENDING	1.074E+09	Refund Generated due to adjustment on Bill #0080074312-2024-2024-0000	Situation error	10/10/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$205.04)	\$0.00	(\$205.04)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															500	Tax	\$157.10	\$0.00	\$157.10
															500	Vehicle Fee	\$25.00	\$0.00	\$25.00
															028	Tax	\$21.34	\$0.00	\$21.34
002	Tax	\$0.00	\$0.00	\$0.00															
003	Tax	\$0.00	\$0.00	\$0.00															
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$31.60
SALGADO CONSTRUCTION GROUP	SALGADO CONSTRUCTION GROUP		6810 B ALEXANDER FARM RD		MONROE, NC 28110	Adjustment < \$100	0080056710	LDE2928	PENDING	858871976	Refund Generated due to adjustment on Bill #0080056710-2024-2024-0000	Situation error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$36.23)	\$0.00	(\$36.23)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															017	Tax	\$4.24	\$0.00	\$4.24
															002	Tax	\$0.00	\$0.00	\$0.00
															003	Tax	\$0.00	\$0.00	\$0.00
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$61.99



North Carolina Vehicle Tax System

NCVTS Pending Refund report

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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
SAM TYSON BUILDERS	SAM TYSON BUILDERS		4407 OLD CHARLOTTE HWY		MONROE, NC 28110	Proration	0057160870	HS2629	AUTHORIZED	753076632	Refund Generated due to proration on Bill #0057160870-2023-2023-0000-00	Vehicle Sold	10/17/2024	10/18/2024 8:18:28 AM	001	Tax	(\$29.90)	\$0.00	(\$29.90)
															600	Tax	(\$33.89)	\$0.00	(\$33.89)
															019	Tax	(\$9.56)	\$0.00	(\$9.56)
															002	Tax	(\$68.55)	\$0.00	(\$68.55)
															003	Tax	(\$3.21)	\$0.00	(\$3.21)
															004	Tax	(\$5.35)	\$0.00	(\$5.35)
005	Tax	(\$0.71)	\$0.00	(\$0.71)															
Refund																			\$151.17
SAMEZADEH ERAMSADATI, SEYED ALIREZA	SAMEZADEH ERAMSADATI, SEYED ALIREZA		129 LINDSTROM WAY		WAXHAW, NC 28173	Proration	0058522317	HMH3190	AUTHORIZED	644154090	Refund Generated due to proration on Bill #0058522317-2023-2023-0000-00	Vehicle Sold	10/07/2024	10/8/2024 8:14:19 AM	001	Tax	(\$3.36)	\$0.00	(\$3.36)
															800	Tax	(\$0.93)	\$0.00	(\$0.93)
															002	Tax	(\$7.72)	\$0.00	(\$7.72)
															003	Tax	(\$0.36)	\$0.00	(\$0.36)
															004	Tax	(\$0.60)	\$0.00	(\$0.60)
															005	Tax	(\$0.08)	\$0.00	(\$0.08)
Refund																			\$13.05
SATTEWHITE, TERESA ANN	SATTEWHITE, TERESA ANN		5310 GREYFRIAR CT		WAXHAW, NC 28173	Proration	0072502247	PMP7310	AUTHORIZED	754549936	Refund Generated due to proration on Bill #0072502247-2023-2023-0000-00	Vehicle Sold	10/25/2024	10/28/2024 8:22:21 AM	001	Tax	(\$31.92)	\$0.00	(\$31.92)
															970	Tax	(\$2.52)	\$0.00	(\$2.52)
															015	Tax	(\$9.07)	\$0.00	(\$9.07)
															002	Tax	(\$73.18)	\$0.00	(\$73.18)
															003	Tax	(\$3.42)	\$0.00	(\$3.42)
															004	Tax	(\$5.71)	\$0.00	(\$5.71)
005	Tax	(\$0.77)	\$0.00	(\$0.77)															
Refund																			\$126.69
SCHUETZ, RYAN JOHN	SCHUETZ, RYAN JOHN	SCHUETZ, LAURA OSTEEEN	8908 BRACKENHOUSE LN		WAXHAW, NC 28173	Proration	0079337829	VDX3885	AUTHORIZED	644180616	Refund Generated due to proration on Bill #0079337829-2024-2024-0000-00	Vehicle Sold	10/08/2024	10/9/2024 8:06:13 AM	001	Tax	(\$1.41)	\$0.00	(\$1.41)
															026	Tax	(\$0.34)	\$0.00	(\$0.34)
															002	Tax	(\$3.22)	\$0.00	(\$3.22)
															003	Tax	(\$0.15)	\$0.00	(\$0.15)
															004	Tax	(\$0.25)	\$0.00	(\$0.25)
															005	Tax	(\$0.03)	\$0.00	(\$0.03)
Refund																			\$5.46
SCIORTINO, STEPHEN KEITH	SCIORTINO, STEPHEN KEITH		1908 OAK SHADOW WAY		MARVIN, NC 28173	Proration	0075351079	TKR7741	AUTHORIZED	862343248	Refund Generated due to proration on Bill #0075351079-2023-2023-0000-00	Vehicle Sold	10/25/2024	10/28/2024 8:21:53 AM	001	Tax	(\$7.43)	\$0.00	(\$7.43)
															101	Tax	(\$2.73)	\$0.00	(\$2.73)
															101	Vehicle Fee	\$0.00	\$0.00	\$0.00
															026	Tax	(\$1.71)	\$0.00	(\$1.71)
															002	Tax	(\$17.04)	\$0.00	(\$17.04)
															003	Tax	(\$0.80)	\$0.00	(\$0.80)
004	Tax	(\$1.33)	\$0.00	(\$1.33)															
005	Tax	(\$0.18)	\$0.00	(\$0.18)															
Refund																			\$31.22
SELLS, RICHARD MILES	SELLS, RICHARD MILES	SELLS, VICTORIA ERICKSON	3223 JUSTIN BRASWELL RD		MONROE, NC 28110	Proration	0007085062	YZE8727	AUTHORIZED	645301344	Refund Generated due to proration on Bill #0007085062-2023-2023-0000-00	Vehicle Sold	10/16/2024	10/17/2024 9:10:55 AM	001	Tax	(\$0.95)	\$0.00	(\$0.95)
															021	Tax	(\$0.36)	\$0.00	(\$0.36)
															002	Tax	(\$2.19)	\$0.00	(\$2.19)
															003	Tax	(\$0.10)	\$0.00	(\$0.10)
															004	Tax	(\$0.17)	\$0.00	(\$0.17)
															005	Tax	(\$0.02)	\$0.00	(\$0.02)
Refund																			\$3.79
SHAUGER, LANCE RED HAWK	SHAUGER, LANCE RED HAWK		4801 MUSCADINE LN		MONROE, NC 28110	Adjustment < \$100	0079736068	RES3619	PENDING	966230289	Refund Generated due to adjustment on Bill #0079736068-2023-2023-0000	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
															200	Tax	(\$14.27)	(\$1.25)	(\$15.52)
															200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)
															980	Tax	\$0.57	\$0.05	\$0.62
															021	Tax	\$1.74	\$0.15	\$1.89
															002	Tax	\$0.00	\$0.00	\$0.00
003	Tax	\$0.00	\$0.00	\$0.00															
004	Tax	\$0.00	\$0.00	\$0.00															
005	Tax	\$0.00	\$0.00	\$0.00															
Refund																			\$43.01
SHEKIAN, JONATHAN	SHEKIAN, JONATHAN		1221 BROUGH HALL DR		WAXHAW, NC 28173	Proration	0041960779	PFS6963	AUTHORIZED	860899824	Refund Generated due to proration on Bill #0041960779-2023-2023-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:12:30 AM	001	Tax	(\$9.41)	\$0.00	(\$9.41)
															500	Tax	(\$22.21)	\$0.00	(\$22.21)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$2.41)	\$0.00	(\$2.41)
															002	Tax	(\$21.59)	\$0.00	(\$21.59)
															003	Tax	(\$1.01)	\$0.00	(\$1.01)
004	Tax	(\$1.69)	\$0.00	(\$1.69)															
005	Tax	(\$0.23)	\$0.00	(\$0.23)															
Refund																			\$58.55
SHOLLEY, ALEXIS MARIE	SHOLLEY, ALEXIS MARIE		5405 TUSCANY DR		WAXHAW, NC 28173	Proration	0077265144	TAA1826	AUTHORIZED	646160976	Refund Generated due to proration on Bill #0077265144-2023-2023-0000-00	Vehicle Sold	10/22/2024	10/23/2024 10:28:07 AM	001	Tax	(\$19.41)	\$0.00	(\$19.41)
															015	Tax	(\$5.52)	\$0.00	(\$5.52)
															002	Tax	(\$44.51)	\$0.00	(\$44.51)
															003	Tax	(\$2.08)	\$0.00	(\$2.08)
															004	Tax	(\$3.47)	\$0.00	(\$3.47)
															005	Tax	(\$0.46)	\$0.00	(\$0.46)
Refund																			\$75.45
SHREE KALASH CORPORATION	SHREE KALASH CORPORATION	SHAH, TUSHAR MUKUNDBHAI	2000 LANCASTER AVE		MONROE, NC 28112	Proration	0079832030	FAC9799	AUTHORIZED	754102776	Refund Generated due to proration on Bill #0079832030-2024-2024-0000-00	Vehicle Sold	10/23/2024	10/24/2024 8:19:08 AM	001	Tax	(\$53.41)	\$0.00	(\$53.41)
															200	Tax	(\$164.44)	\$0.00	(\$164.44)
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00
															002	Tax	(\$122.46)	\$0.00	(\$122.46)
															003	Tax	(\$5.72)	\$0.00	(\$5.72)
															004	Tax	(\$9.56)	\$0.00	(\$9.56)
005	Tax	(\$1.27)	\$0.00	(\$1.27)															
Refund																			\$356.86



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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															
SINGLETERY, RUTH ANN	SINGLETERY, RUTH ANN	WEBSTER, WILLIAM LAWRENCE	3512 BUCKEYE CT		WAXHAW, NC 28173	Proration	0063509043	RAC7700	AUTHORIZED	862342704	Refund Generated due to proration on Bill #0063509043-2023-0000-00	Vehicle Sold	10/25/2024	10/28/2024 8:22:36 AM	001	Tax	(\$12.09)	\$0.00	(\$12.09)															
															500	Tax	(\$28.52)	\$0.00	(\$28.52)															
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															028	Tax	(\$3.10)	\$0.00	(\$3.10)															
															002	Tax	(\$27.72)	\$0.00	(\$27.72)															
															003	Tax	(\$1.30)	\$0.00	(\$1.30)															
															004	Tax	(\$2.16)	\$0.00	(\$2.16)															
															005	Tax	(\$0.29)	\$0.00	(\$0.29)															
															Refund																		\$75.18	
															SPEARS, JUDY DOWLESS	SPEARS, JUDY DOWLESS		512 HILLSDALE DR		MONROE, NC 28110	Adjustment < \$100	0080098281	LDP2176	PENDING	751544010	Refund Generated due to adjustment on Bill #0080098281-2024-2024-0000-00	Over Assessment	10/08/2024		001	Tax	(\$6.96)	\$0.00	(\$6.96)
200	Tax	(\$21.43)	\$0.00	(\$21.43)																														
200	Vehicle Fee	\$0.00	\$0.00	\$0.00																														
002	Tax	(\$15.96)	\$0.00	(\$15.96)																														
003	Tax	(\$0.74)	\$0.00	(\$0.74)																														
004	Tax	(\$1.24)	\$0.00	(\$1.24)																														
005	Tax	(\$0.17)	\$0.00	(\$0.17)																														
Refund																														\$46.50				
STACK, MICHAEL THOMAS	STACK, MICHAEL THOMAS		114 SHARONVIEW ST		FORT MILL, SC 29715	Proration	0071392449	RCB5019	AUTHORIZED	750835617	Refund Generated due to proration on Bill #0071392449-2023-2023-0000-00	Reg. Out of state	10/03/2024	10/4/2024 2:28:34 PM																001	Tax	(\$8.39)	(\$0.41)	(\$8.80)
																														600	Tax	(\$9.51)	(\$0.48)	(\$9.99)
															019	Tax	(\$2.68)	(\$0.13)	(\$2.81)															
															002	Tax	(\$19.23)	(\$0.97)	(\$20.20)															
															003	Tax	(\$0.90)	(\$0.05)	(\$0.95)															
															004	Tax	(\$1.50)	(\$0.08)	(\$1.58)															
															005	Tax	(\$0.20)	(\$0.01)	(\$0.21)															
															Refund																		\$44.54	
															STALLINGS, CHARLES JOSHUA	STALLINGS, CHARLES JOSHUA		4901 PIONEER LN		INDIAN TRAIL, NC 28079	Adjustment < \$100	0017924497	2N8961	PENDING	753077073	Refund Generated due to adjustment on Bill #0017924497-2023-2023-0000-00	Military	10/17/2024		001	Tax	(\$4.86)	\$0.00	(\$4.86)
																														600	Tax	(\$5.51)	\$0.00	(\$5.51)
020	Tax	(\$1.42)	\$0.00	(\$1.42)																														
002	Tax	(\$11.15)	\$0.00	(\$11.15)																														
003	Tax	(\$0.52)	\$0.00	(\$0.52)																														
004	Tax	(\$0.87)	\$0.00	(\$0.87)																														
005	Tax	(\$0.12)	\$0.00	(\$0.12)																														
Refund																														\$24.45				
STEWART, RODERICK LOTON	STEWART, RODERICK LOTON		1051 MOUNTAIN LAUREL CT		MATTHEWS, NC 28104	Proration	0071212066	KAZ9663	AUTHORIZED	750584639	Refund Generated due to proration on Bill #0071212066-2023-2023-0000-00	Vehicle Sold	10/02/2024	10/3/2024 8:08:05 AM																001	Tax	(\$59.03)	\$0.00	(\$59.03)
																														700	Tax	(\$67.28)	\$0.00	(\$67.28)
															020	Tax	(\$17.29)	\$0.00	(\$17.29)															
															002	Tax	(\$135.36)	\$0.00	(\$135.36)															
															003	Tax	(\$6.33)	\$0.00	(\$6.33)															
															004	Tax	(\$10.56)	\$0.00	(\$10.56)															
															005	Tax	(\$1.41)	\$0.00	(\$1.41)															
															Refund																		\$297.26	
															STURGEON, JOHN GILBERT	STURGEON, JOHN GILBERT		502 WOODBRIDGE LN		INDIAN TRAIL, NC 28079	Proration	0036630693	PEV7207	AUTHORIZED	755187223	Refund Generated due to proration on Bill #0036630693-2023-2023-0000-00	Vehicle Sold	10/29/2024	10/30/2024 11:42:35 AM	001	Tax	(\$3.25)	\$0.00	(\$3.25)
																														930	Tax	(\$0.40)	\$0.00	(\$0.40)
016	Tax	(\$1.00)	\$0.00	(\$1.00)																														
002	Tax	(\$7.44)	\$0.00	(\$7.44)																														
003	Tax	(\$0.35)	\$0.00	(\$0.35)																														
004	Tax	(\$0.58)	\$0.00	(\$0.58)																														
005	Tax	(\$0.08)	\$0.00	(\$0.08)																														
Refund																														\$13.10				
SUN, JOSH CHOU	SUN, JOSH CHOU		1006 MANORWYCK FARMS DR		WAXHAW, NC 28173	Proration	0038478200	DAE5119	AUTHORIZED	857811416	Refund Generated due to proration on Bill #0038478200-2023-2023-0000-00	Vehicle Sold	10/02/2024	10/3/2024 8:07:56 AM																001	Tax	(\$3.67)	\$0.00	(\$3.67)
																														500	Tax	(\$8.65)	\$0.00	(\$8.65)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															028	Tax	(\$0.94)	\$0.00	(\$0.94)															
															002	Tax	(\$8.41)	\$0.00	(\$8.41)															
															003	Tax	(\$0.39)	\$0.00	(\$0.39)															
															004	Tax	(\$0.66)	\$0.00	(\$0.66)															
															005	Tax	(\$0.09)	\$0.00	(\$0.09)															
															Refund																		\$22.81	
															SWARTZ, JULIE NICOLE	SWARTZ, JULIE NICOLE		324 ABINGTON ST		MATTHEWS, NC 28104	Adjustment < \$100	0076133805	FKM1189	PENDING	966229137	Refund Generated due to adjustment on Bill #0076133805-2023-2023-0000	Situs error	10/07/2024		001	Tax	\$0.00	\$0.00	\$0.00
200	Tax	(\$53.37)	\$0.00	(\$53.37)																														
200	Vehicle Fee	(\$30.00)	\$0.00	(\$30.00)																														
600	Tax	\$19.65	\$0.00	\$19.65																														
020	Tax	\$5.08	\$0.00	\$5.08																														
002	Tax	\$0.00	\$0.00	\$0.00																														
003	Tax	\$0.00	\$0.00	\$0.00																														
004	Tax	\$0.00	\$0.00	\$0.00																														
005	Tax	\$0.00	\$0.00	\$0.00																														
Refund																														\$58.64				
TARASEVICH, MICHAEL JACOB	TARASEVICH, MICHAEL JACOB		1815 LEXINGTON AVE		MONROE, NC 28112	Adjustment < \$100	0068716951	TFE4397	PENDING	752851659	Refund Generated due to adjustment on Bill #0068716951-2023-2023-0000-00	Over Assessment	10/16/2024		001	Tax	(\$8.56)	\$0.00	(\$8.56)															
															200	Tax	(\$26.33)	\$0.00	(\$26.33)															
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00															
															002	Tax	(\$19.61)	\$0.00	(\$19.61)															
															003	Tax	(\$0.91)	\$0.00	(\$0.91)															
															004	Tax	(\$1.53)	\$0.00	(\$1.53)															
															005	Tax	(\$0.20)	\$0.00	(\$0.20)															
															Refund																		\$57.14	



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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														
THAKKAR, ANKIT DIPAKKUMAR	THAKKAR, ANKIT DIPAKKUMAR		1213 AUTUMN RIDGE DR		WAXHAW, NC 28173	Proration	0058264176	EBE5593	AUTHORIZED	859163088	Refund Generated due to proration on Bill #0058264176-2023-2023-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:14:47 AM	001	Tax	(\$4.54)	\$0.00	(\$4.54)														
															500	Tax	(\$10.70)	\$0.00	(\$10.70)														
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															028	Tax	(\$1.16)	\$0.00	(\$1.16)														
															002	Tax	(\$10.40)	\$0.00	(\$10.40)														
															003	Tax	(\$0.48)	\$0.00	(\$0.48)														
															004	Tax	(\$0.81)	\$0.00	(\$0.81)														
															005	Tax	(\$0.11)	\$0.00	(\$0.11)														
															Refund																		\$28.20
															THAKKAR, ANKIT DIPAKKUMAR	THAKKAR, ANKIT DIPAKKUMAR		1213 AUTUMN RIDGE DR		WAXHAW, NC 28173	Proration	0075887496	TMR5376	AUTHORIZED	536976935	Refund Generated due to proration on Bill #0075887496-2022-2022-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:14:47 AM	001	Tax	(\$2.17)	(\$0.13)
500	Tax	(\$1.73)	(\$0.12)	(\$1.85)																													
500	Vehicle Fee	\$0.00	\$0.00	\$0.00																													
028	Tax	(\$0.19)	(\$0.01)	(\$0.20)																													
003	Tax	(\$0.48)	(\$0.04)	(\$0.52)																													
Refund																														\$4.87			
TWEET, THEODORE LLOYD	TWEET, THEODORE LLOYD	TWEET, SYLVIA MARLENE	2117 KINGSTREE DR		MONROE, NC 28112	Proration	0077313588	VAE5328	AUTHORIZED	751542120	Refund Generated due to proration on Bill #0077313588-2023-2023-0000-00	Vehicle Sold	10/08/2024	10/9/2024 8:07:06 AM	001	Tax	(\$25.88)	\$0.00	(\$25.88)														
															200	Tax	(\$79.69)	\$0.00	(\$79.69)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$59.34)	\$0.00	(\$59.34)														
															003	Tax	(\$2.77)	\$0.00	(\$2.77)														
															004	Tax	(\$4.63)	\$0.00	(\$4.63)														
															005	Tax	(\$0.62)	\$0.00	(\$0.62)														
Refund																		\$172.93															
UNION MECHANICAL SERVICESINC	UNION MECHANICAL SERVICESINC		PO BOX 427		MONROE, NC 28111	Proration	0017920116	ZWK4932	AUTHORIZED	755144481	Refund Generated due to proration on Bill #0017920116-2023-2023-0000-00	Vehicle Sold	10/28/2024	10/29/2024 8:06:19 AM	001	Tax	(\$3.25)	(\$0.17)	(\$3.42)														
															200	Tax	(\$10.01)	(\$0.50)	(\$10.51)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$7.45)	(\$0.37)	(\$7.82)														
															003	Tax	(\$0.35)	(\$0.02)	(\$0.37)														
															004	Tax	(\$0.58)	(\$0.02)	(\$0.60)														
															005	Tax	(\$0.07)	\$0.00	(\$0.07)														
Refund																		\$22.78															
VASAVADA, AMIT VIRANCHIPRA SAD	VASAVADA, AMIT VIRANCHIPRA SAD		1071 LAKE FOREST DR		MATTHEWS, NC 28104	Proration	0076902291	KMH5321	AUTHORIZED	643748964	Refund Generated due to proration on Bill #0076902291-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:15:51 AM	001	Tax	(\$32.76)	\$0.00	(\$32.76)														
															800	Tax	(\$9.03)	\$0.00	(\$9.03)														
															002	Tax	(\$75.12)	\$0.00	(\$75.12)														
															003	Tax	(\$3.51)	\$0.00	(\$3.51)														
															004	Tax	(\$5.86)	\$0.00	(\$5.86)														
															005	Tax	(\$0.78)	\$0.00	(\$0.78)														
Refund																		\$127.06															
VAUGHAN, KAREN ZOELLER	VAUGHAN, KAREN ZOELLER	VAUGHAN, ROBERT KEITH	220 HOLLYHOCK DR		MATTHEWS, NC 28104	Proration	0069942664	JDS9068	AUTHORIZED	644372946	Refund Generated due to proration on Bill #0069942664-2023-2023-0000-00	Vehicle Sold	10/10/2024	10/11/2024 11:13:14 AM	001	Tax	(\$14.65)	\$0.00	(\$14.65)														
															026	Tax	(\$3.37)	\$0.00	(\$3.37)														
															002	Tax	(\$33.60)	\$0.00	(\$33.60)														
															003	Tax	(\$1.57)	\$0.00	(\$1.57)														
															004	Tax	(\$2.62)	\$0.00	(\$2.62)														
															005	Tax	(\$0.35)	\$0.00	(\$0.35)														
Refund																		\$56.16															
WALDHELM, ROCCO CHARLES	WALDHELM, ROCCO CHARLES		13026 ROYAL GEORGE AVE		ODESSA, FL 33556	Proration	0059299383	JDA9354	AUTHORIZED	755144698	Refund Generated due to proration on Bill #0059299383-2023-2023-0000-00	Vehicle Sold	10/28/2024	10/29/2024 8:06:08 AM	001	Tax	(\$7.67)	\$0.00	(\$7.67)														
															200	Tax	(\$23.62)	\$0.00	(\$23.62)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$17.58)	\$0.00	(\$17.58)														
															003	Tax	(\$0.82)	\$0.00	(\$0.82)														
															004	Tax	(\$1.37)	\$0.00	(\$1.37)														
005	Tax	(\$0.18)	\$0.00	(\$0.18)																													
Refund																		\$51.24															
WALLACE, JUSTIN EARL	WALLACE, JUSTIN EARL		130 ABBOTSBURY CT		WAXHAW, NC 28173	Proration	0065491507	THEKID	AUTHORIZED	642767184	Refund Generated due to proration on Bill #0065491507-2023-2023-0000-00	Vehicle Sold	10/28/2024	10/30/2024 11:43:17 AM	001	Tax	(\$2.28)	\$0.00	(\$2.28)														
															026	Tax	(\$0.52)	\$0.00	(\$0.52)														
															002	Tax	(\$5.22)	\$0.00	(\$5.22)														
															003	Tax	(\$0.25)	\$0.00	(\$0.25)														
															004	Tax	(\$0.41)	\$0.00	(\$0.41)														
															005	Tax	(\$0.05)	\$0.00	(\$0.05)														
Refund																		\$8.73															
WALTERS, SHARON MACLAUGHLIN	WALTERS, SHARON MACLAUGHLIN		1494 CREEK RIDGE LN		CAROLINA SHORES, NC 28467	Proration	0059804451	JDX6705	AUTHORIZED	755142913	Refund Generated due to proration on Bill #0059804451-2023-2023-0000-00	Vehicle Sold	10/28/2024	10/29/2024 8:07:05 AM	001	Tax	(\$3.74)	\$0.00	(\$3.74)														
															200	Tax	(\$11.53)	\$0.00	(\$11.53)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$8.59)	\$0.00	(\$8.59)														
															003	Tax	(\$0.40)	\$0.00	(\$0.40)														
															004	Tax	(\$0.67)	\$0.00	(\$0.67)														
005	Tax	(\$0.09)	\$0.00	(\$0.09)																													
Refund																		\$25.02															
WALTERS, SHARON MACLAUGHLIN	WALTERS, SHARON MACLAUGHLIN		1494 CREEK RIDGE LN		CAROLINA SHORES, NC 28467	Proration	0067026099	KBN1770	AUTHORIZED	755142920	Refund Generated due to proration on Bill #0067026099-2023-2023-0000-00	Vehicle Sold	10/28/2024	10/29/2024 8:07:05 AM	001	Tax	(\$1.77)	\$0.00	(\$1.77)														
															200	Tax	(\$5.46)	\$0.00	(\$5.46)														
															200	Vehicle Fee	\$0.00	\$0.00	\$0.00														
															002	Tax	(\$4.07)	\$0.00	(\$4.07)														
															003	Tax	(\$0.19)	\$0.00	(\$0.19)														
															004	Tax	(\$0.32)	\$0.00	(\$0.32)														
005	Tax	(\$0.04)	\$0.00	(\$0.04)																													
Refund																		\$11.85															



North Carolina Vehicle Tax System

NCVTS Pending Refund report

Report Date 11/19/2024 11:30:48 AM

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
WELCH, HARRY LEE JR	WELCH, HARRY LEE JR		2249 GREENBROOK PKWY		MATTHEWS, NC 28104	Proration	0031225270	EAV9533	AUTHORIZED	644180592	Refund Generated due to proration on Bill #0031225270-2023-2023-0000-00	Vehicle Sold	10/08/2024	10/9/2024 8:06:19 AM	001	Tax	(\$11.19)	\$0.00	(\$11.19)
															800	Tax	(\$3.09)	\$0.00	(\$3.09)
															002	Tax	(\$25.65)	\$0.00	(\$25.65)
															003	Tax	(\$1.20)	\$0.00	(\$1.20)
															004	Tax	(\$2.00)	\$0.00	(\$2.00)
															005	Tax	(\$0.27)	\$0.00	(\$0.27)
Refund \$43.40																			
WHITTAKER, MATTHEW GRAYSON	WHITTAKER, MATTHEW GRAYSON		4327 APPLEWOOD LN		WAXHAW, NC 28173	Proration	0071540195	KFN8962	AUTHORIZED	647267232	Refund Generated due to proration on Bill #0071540195-2023-2023-0000-00	Vehicle Totaled	10/28/2024	10/29/2024 8:05:48 AM	001	Tax	(\$5.45)	\$0.00	(\$5.45)
															028	Tax	(\$1.40)	\$0.00	(\$1.40)
															002	Tax	(\$12.50)	\$0.00	(\$12.50)
															003	Tax	(\$0.58)	\$0.00	(\$0.58)
															004	Tax	(\$0.97)	\$0.00	(\$0.97)
															005	Tax	(\$0.13)	\$0.00	(\$0.13)
Refund \$21.03																			
WILKES, STEPHEN RAY	WILKES, STEPHEN RAY	WILKES, DEBORAH LEAGAN	1002 LINSTAED DR		INDIAN TRAIL, NC 28079	Proration	0069195060	8K7606	AUTHORIZED	751040297	Refund Generated due to proration on Bill #0069195060-2023-2023-0000-00	Vehicle Sold	10/04/2024	10/7/2024 8:16:15 AM	001	Tax	(\$5.21)	\$0.00	(\$5.21)
															600	Tax	(\$5.90)	\$0.00	(\$5.90)
															020	Tax	(\$1.53)	\$0.00	(\$1.53)
															002	Tax	(\$11.93)	\$0.00	(\$11.93)
															003	Tax	(\$0.56)	\$0.00	(\$0.56)
															004	Tax	(\$0.93)	\$0.00	(\$0.93)
005	Tax	(\$0.13)	\$0.00	(\$0.13)															
Refund \$26.19																			
WILLIAM, NELSON	WILLIAM, NELSON		4820 SANDTYN DR		WAXHAW, NC 28173	Proration	0078745986	JHN1956	AUTHORIZED	645301002	Refund Generated due to proration on Bill #0078745986-2023-2023-0000-00	Vehicle Sold	10/16/2024	10/17/2024 8:36:03 AM	001	Tax	(\$23.98)	\$0.00	(\$23.98)
															015	Tax	(\$6.82)	\$0.00	(\$6.82)
															002	Tax	(\$54.98)	\$0.00	(\$54.98)
															003	Tax	(\$2.57)	\$0.00	(\$2.57)
															004	Tax	(\$4.29)	\$0.00	(\$4.29)
															005	Tax	(\$0.57)	\$0.00	(\$0.57)
Refund \$93.21																			
WILLIAMS, MATTHEW STEVEN	WILLIAMS, MATTHEW STEVEN		8008 BATTERSEA CT		WAXHAW, NC 28173	Proration	0071318709	TJA8765	AUTHORIZED	862091840	Refund Generated due to proration on Bill #0071318709-2023-2023-0000-00	Vehicle Sold	10/24/2024	10/25/2024 1:09:45 PM	001	Tax	(\$55.13)	\$0.00	(\$55.13)
															500	Tax	(\$130.06)	\$0.00	(\$130.06)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$14.15)	\$0.00	(\$14.15)
															002	Tax	(\$126.42)	\$0.00	(\$126.42)
															003	Tax	(\$5.91)	\$0.00	(\$5.91)
004	Tax	(\$9.86)	\$0.00	(\$9.86)															
005	Tax	(\$1.32)	\$0.00	(\$1.32)															
Refund \$342.85																			
WILLOUGHBY, DAVID ARNOLD	WILLOUGHBY, DAVID ARNOLD		10832 PERSIMMON CREEK DR		MINT HILL, NC 28227	Proration	0074544414	JAT2283	AUTHORIZED	644541162	Refund Generated due to proration on Bill #0074544414-2023-2023-0000-00	Reg. Out of state	10/11/2024	10/16/2024 8:23:12 AM	001	Tax	(\$4.33)	\$0.00	(\$4.33)
															016	Tax	(\$1.33)	\$0.00	(\$1.33)
															002	Tax	(\$9.92)	\$0.00	(\$9.92)
															003	Tax	(\$0.46)	\$0.00	(\$0.46)
															004	Tax	(\$0.77)	\$0.00	(\$0.77)
															005	Tax	(\$0.10)	\$0.00	(\$0.10)
Refund \$16.91																			
WRIGHT, MARLO CARTER	WRIGHT, MARLO CARTER		1912 RAPIDAN LN		WEDDINGTON, NC 28104	Proration	0078639825	LAY2683	AUTHORIZED	647811720	Refund Generated due to proration on Bill #0078639825-2023-2023-0000-00	Vehicle Sold	10/31/2024	11/4/2024 8:48:40 AM	001	Tax	(\$34.81)	\$0.00	(\$34.81)
															800	Tax	(\$9.60)	\$0.00	(\$9.60)
															002	Tax	(\$79.83)	\$0.00	(\$79.83)
															003	Tax	(\$3.73)	\$0.00	(\$3.73)
															004	Tax	(\$6.23)	\$0.00	(\$6.23)
															005	Tax	(\$0.83)	\$0.00	(\$0.83)
Refund \$135.03																			
WRIGLEY, BENHAM ROBERT III	WRIGLEY, BENHAM ROBERT III	WRIGLEY, AMANDA BUFFALO	712 GLOSSY IBIS LN		KIAWAH ISLAND, SC 29455	Proration	0066697875	KAM2243	AUTHORIZED	857812320	Refund Generated due to proration on Bill #0066697875-2023-2023-0000-00	Reg. Out of state	10/02/2024	10/3/2024 8:07:11 AM	001	Tax	(\$15.07)	\$0.00	(\$15.07)
															500	Tax	(\$35.55)	\$0.00	(\$35.55)
															500	Vehicle Fee	\$0.00	\$0.00	\$0.00
															028	Tax	(\$3.87)	\$0.00	(\$3.87)
															002	Tax	(\$34.55)	\$0.00	(\$34.55)
															003	Tax	(\$1.61)	\$0.00	(\$1.61)
004	Tax	(\$2.69)	\$0.00	(\$2.69)															
005	Tax	(\$0.36)	\$0.00	(\$0.36)															
Refund \$93.70																			
WYLDE, BRADLEY MICHAEL	WYLDE, BRADLEY MICHAEL		1211 LOOKOUT CIR		WAXHAW, NC 28173	Proration	0071230892	KCC5752	AUTHORIZED	645675948	Refund Generated due to proration on Bill #0071230892-2023-2023-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:10:21 AM	001	Tax	(\$15.82)	\$0.00	(\$15.82)
															026	Tax	(\$3.64)	\$0.00	(\$3.64)
															002	Tax	(\$36.26)	\$0.00	(\$36.26)
															003	Tax	(\$1.69)	\$0.00	(\$1.69)
															004	Tax	(\$2.83)	\$0.00	(\$2.83)
															005	Tax	(\$0.37)	\$0.00	(\$0.37)
Refund \$60.61																			
WYLDE, DARCY JAE	WYLDE, DARCY JAE		1211 LOOKOUT CIR		WAXHAW, NC 28173	Proration	0063695965	RCZ4158	AUTHORIZED	645675942	Refund Generated due to proration on Bill #0063695965-2023-2023-0000-00	Vehicle Sold	10/18/2024	10/21/2024 8:10:21 AM	001	Tax	(\$0.55)	\$0.00	(\$0.55)
															026	Tax	(\$0.13)	\$0.00	(\$0.13)
															002	Tax	(\$1.27)	\$0.00	(\$1.27)
															003	Tax	(\$0.06)	\$0.00	(\$0.06)
															004	Tax	(\$0.10)	\$0.00	(\$0.10)
															005	Tax	(\$0.01)	\$0.00	(\$0.01)
Refund \$2.12																			
Refund Total																		\$18010.83	



Union County, NC

Staff Report

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

File #: 24-857

Agenda Date: 12/16/2024

TITLE:

Monthly Update - Wastewater Treatment Capacity

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive status update on wastewater treatment capacity for the Twelve Mile Creek, Crooked Creek, Olde Sycamore, Tallwood, and Grassy Branch facilities.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Water is closely monitoring the wastewater treatment capacities at our Water Reclamation Facilities. Permitting Capacity is evaluated using the Actual Plant Flows plus the Permitted/Obligated Flows (unconnected). Union County Water was asked to provide regular updates. Plant flow information through November 2024 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 72.4%
- Percent of Actual + Permitted Flows = 92.3%
- Actual Flows (MGD) = 5.427
- Actual + Permitted Obligated Flows (MGD) = 6.926

Crooked Creek

- Percent of Actual Flows = 60.0%
- Percent of Actual + Permitted Flows = 90.6%
- Actual Flows (MGD) = 1.140
- Actual + Permitted Obligated Flows (MGD) = 1.722

Olde Sycamore

- Percent of Actual Flows = 30.7%
- Percent of Actual + Permitted Flows = 30.7%
- Actual Flows (MGD) = 0.046
- Actual + Permitted Obligated Flows (MGD) = 0.046

Tallwood

- Percent of Actual Flows = 46.0%
- Percent of Actual + Permitted Flows = 46.0%
- Actual Flows (MGD) = 0.023
- Actual + Permitted Obligated Flows (MGD) = 0.023

Grassy Branch

- Percent of Actual Flows = 96.0%
- Percent of Actual + Permitted Flows = 98.0%
- Actual Flows (MGD) = 0.048
- Actual + Permitted Obligated Flows (MGD) = 0.049

In addition to the wastewater treatment capacities, flow volumes associated with development projects that are in the planning and review process within the Twelve Mile Creek and Crooked Creek WRF service areas are provided for information as well. Development flow volumes through November 2024 are summarized in the attached tables.

FINANCIAL IMPACT:

None.

Water Reclamation Facility Flows

WRF	Permitted Capacity (MGD)	Actual Average Daily Flow ¹ (MGD)	Percent of Actual Flow Used	Actual + Permitted Obligated Flows (MGD)	Percent of Permitted Flow Used	Actual Rainfall (in)
Twelve Mile Creek	7.5	5.427	72.4%	6.926	92.3%	0.1
Crooked Creek	1.9	1.140	60.0%	1.722	90.6%	2.2
Olde Sycamore	0.15	0.046	30.7%	0.046	30.7%	1.4
Tallwood	0.05	0.023	46.0%	0.023	46.0%	1.2
Grassy Branch	0.05	0.048	96.0%	0.049	98.0%	1.8

¹Based on a 12-month rolling average.

Development Flows

12-Mile Creek WRF		
Backlog Type	Number of Projects	Requested Flow (MGD)
Approved – Permit Submittal Pending	2	0.133
Engineering Plan Review	13	0.508
Sketch Plan Review	15	0.731
Totals	30	1.372

Crooked Creek WRF		
Backlog Type	Number of Projects	Requested Flow (MGD)
Approved – Permit Submittal Pending	2	0.051
Engineering Plan Review	7	0.175
Sketch Plan Review	3	0.054
Totals	12	0.280



Union County, NC

Staff Report

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

File #: 24-762

Agenda Date: 12/16/2024

TITLE:

Opioid Settlement Funding Plan Update

INFORMATION CONTACT:

Michelle Lancaster, Consultant

ACTION REQUESTED:

- 1) Receive information on the County's Opioid Settlement Plan,
- 2) Update the Pay and Classification plan to include a new job classification as follows:
 - Opioid Settlement Program Coordinator / Strategy Analyst - Pay Grade M
- 3) Authorize the addition of one FTE (full-time equivalency) in the County Manager's Office for the following job classification:
 - 1 Opioid Settlement Program Coordinator / Strategy Analyst
- 4) Adopt Budget Amendment #18

PRIOR BOARD ACTIONS:

- 1) June 19, 2023, Regular Meeting, #23-367 - Adopt the Resolution to Direct the Expenditure of Opioid Settlement Funds and authorize the County Manager to negotiate and execute agreements consistent with the agenda item.
- 2) July 17, 2023, Regular Meeting, #23-461 - Ratify and Re-Adopt Resolution
- 3) October 2, 2023, Regular Meeting, #23-692 - Re-Adopt Resolution

BACKGROUND:

North Carolina participated in the national opioid settlement. The NCACC and NCDOJ formed a partnership to ensure that proceeds are provided to local jurisdictions to provide programs and services that directly impact those who have been most impacted by opioids. Union County entered into two Memorandums of Agreement (MOAs) with the state that outline the amount to be received and how the proceeds can be used. The agreements govern how NC would use the proceeds of any future national settlement or bankruptcy resolution with drug distributors and opioid manufacturers. The Opioid litigation settlement funds will be received over an 18-year period.

A settlement has been reached in a class action lawsuit against McKinsey & Company, Inc., and related entities. Allocations to eligible subdivisions, including Union County, were made following the same methodologies as applied in the national opioid settlement with Janssen Pharmaceuticals, a Wave One opioid settlement. For prior Wave One and Wave Two opioid settlements, decisions on how settlement funds will be allocated within a state are subject to the North Carolina Memorandum of Agreement (MOA), including supplemental agreements to the MOA, on the allocation, use, and reporting of funds. However, funds from the McKinsey settlement are not subject to the MOA or any supplemental agreements to the MOA since NC Department of Justice was not involved in this

litigation. Thus, these funds are not appropriated within the County's Special Revenue Fund for Opioid Settlement. As a recipient of this allocation, Union County is required to use the settlement funds exclusively for approved uses designed to abate the opioid epidemic.

Staff is providing an update on the detailed plan for the use of opioid settlement funds approved by the Board of Commissioners at its June 19, 2023, Regular Meeting. Part of the update will include a recommendation to appropriate \$5,000 of McKinsey Settlement Funds for audit testing that was required as part of the County's Single Audit for FY2024.

FINANCIAL IMPACT:

Union County will receive an allocation of \$86,677.12 in FY25, which will be used to fund the new FTE and additional audit testing that was required for opioid funds (\$5,000).

BUDGET AMENDMENT

BUDGET General Fund REQUESTED BY Clayton Voignier
 FISCAL YEAR FY 2025 DATE December 16, 2024

INCREASE

Description
Misc Revenue - Settlement 86,677
Operating Expenditures 86,677

DECREASE

Description

Explanation: To recognize, receive, and appropriate funding for McKinsey Opioid Funding Settlement

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>
10123010-5121-18004	Salary	62,115
10123010-5131-18004	FICA	4,752
10123010-5134-18004	401K	3,106
10123010-5136-18004	Retirement	8,466
10123010-5313-18004	Education/Training	1,000
10123010-5265-18004	Computer Equipment	2,238
10123010-5381-18004	Professional Services	5,000

CREDIT

<u>Code</u>	<u>Account</u>	<u>Amount</u>
10123010-4830-18004	Misc Revenue - Settlements	86,677
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total 86,677

Total 86,677

Prepared By BL

Posted By _____

Date _____

Number 18



Union County, NC

Staff Report

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

File #: 24-823

Agenda Date: 12/16/2024

TITLE:

South Piedmont Regional Autopsy Center Update

INFORMATION CONTACT:

Michelle Lancaster, Consultant

ACTION REQUESTED:

Receive information.

PRIOR BOARD ACTIONS:

May 20, 2024, Regular Meeting, Agenda Item #24-354 - Authorize the County Manager to negotiate and execute an agreement with the state to receive directed grant funds for the facilities and operations to establish a new South Piedmont Regional Medical Examiner's Office

BACKGROUND:

In May 2024, the County entered into an agreement with the Office of the State Medical Examiner to receive a directed grant of \$20,000,000 in nonrecurring state appropriations, (\$15,000,000 in State Fiscal Year (SFY) 2023-2024, and \$5,000,000.00 in SFY 2024-25), for the leasing of facilities and to initiate the renovation and upfitting of an agreed upon space to establish a new South Piedmont Regional Medical Examiner's Office that shall serve at least all of the following counties: Anson, Cabarrus, Gaston, Montgomery, Moore, Richmond, Rowan, Stanly, and Union. Additionally, as part of the agreement, the County receives a directed grant of \$2,000,000 recurring in SFY 2023-24, and SFY 2024-25, for operational costs and equipment associated with the establishment of a county-operated regional autopsy center.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 24-826

Agenda Date: 12/16/2024

TITLE:

Legislative and State Budget Updates

INFORMATION CONTACT:

Michelle Lancaster, Consultant

ACTION REQUESTED:

Receive an update on the 2024 Legislative Agenda and state budget items affecting Union County.

BACKGROUND:

Staff will provide the latest information to the Board of Commissioners regarding legislative activities of the NC General Assembly and items of interest in the State's budget.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 24-850

Agenda Date: 12/16/2024

TITLE:

Senior Nutrition Home Delivery Waitlist

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive information from staff.

PRIOR BOARD ACTIONS:

December 2, 2024, Regular Meeting, Agenda Item # 24-854 - Board added discussion regarding Senior Nutrition Home Delivery Waitlist to Business agenda.

BACKGROUND:

During the December 2, 2024, meeting of the Board of County Commissioners, the Board added an item, to the Business portion of the agenda, related to the Senior Nutrition Home Delivery Program's Waitlist. Based on a request from Commissioner Sides, there was a consensus among the Board for staff to bring additional information about the program back at the December 16, 2024 meeting.

FINANCIAL IMPACT:

None at this time.



Union County, NC

Staff Report

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

File #: 24-858

Agenda Date: 12/16/2024

TITLE:

Consider Accepting the Offer to Purchase County Owned Property

INFORMATION CONTACT:

Brian Matthews, County Manager, 704-292-2597

ACTION REQUESTED:

- (1) The first option is to reject the current bid;
- (2) If the Board does not wish to reject the current bid, then the Board additionally has the following options:
 - a. Authorize additional upset bid periods; or
 - b. Accept \$50,000 for the sale of the Reverter interest in parcel #09-366-006 and (i) authorize the sale of the real property, in accordance with the Board's "Resolution Authorizing the Use of the Upset Bid Process for the Sale of a Future Interest in Certain Real Property," dated October 7, 2024, to the final highest responsive, responsible bidder, Union Academy, in the amount of \$50,000; and (ii) authorize the County Manager to negotiate and execute any documentation necessary to effectuate such sale.

PRIOR BOARD ACTIONS:

- 1) October 7, 2024, Regular Meeting, Agenda item # 24-686 - Resolution authorizing Upset Bid Process for a Future Interest Certain Real Property adopted by the Board.
- 2) November 4, 2024, Regular Meeting, Agenda item # 24-767 - 1) Board authorized an additional upset bid period for disposal of this real property and 2) directed the Clerk to advertise a new upset bid period in accordance with NCGS 160A-269.

BACKGROUND:

Union County currently owns a future, executory interest in approximately 8.15 acres of real property on Old Charlotte Hwy in Monroe, North Carolina, identified as Tax Map #09-366-006 ("Reverter"). Union Academy currently holds a fee simple interest to this property, subject to Union County's Reverter. The County currently does not actively use the property for any governmental functions. The Reverter interest does not vest unless the earliest of the following events occurs: Union Academy's charter is terminated or not renewed for any reason, or Union Academy ceases to occupy said property. County staff desires for the Board to consider the sale of the Reverter and to receive proceeds from the sale.

North Carolina General Statutes allow the disposition of interests in real property by local governments through a variety of means, including advertisement for sealed bids; negotiated offer, advertisement, and upset bid; public auction; or exchange.

Staff has previously received an offer of \$50,000 to purchase the Reverter. The required five percent deposit was received by the clerk on October 18, 2024. The Board authorized the use of the upset bid process for the sale of this Reverter, as set forth in N.C.G.S. § 160A-269. A 10-day period for upset bids to be received for the Reverter was advertised and ended on October 22, 2024, at 5pm.

No upset bids were received. The Board authorized an additional upset bid period at the November 4, 2024, regular meeting. A 10-day period for upset bids to be received for the Reverter was advertised and ended on November 19, 2024. No new bids were received during the additional upset bid period. Once a 10-day period has passed without any qualifying upset bids, the amount of the final high bid shall be reported back to the Board. The Board shall determine whether or not to accept the high bid no later than ninety (90) days after the final upset bid period has passed. Staff is bringing this matter to the Board to consider whether to accept the current offer of \$50,000 from Union Academy.

FINANCIAL IMPACT:

Revenue depends upon acceptance of any final high bid amount.



Union County, NC

Staff Report

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

File #: 24-868

Agenda Date: 12/16/2024

TITLE:

Contract Amendment - MRL Consulting, LLC

INFORMATION CONTACT:

Patrick Niland, Deputy County Manager, 704-283-3630

ACTION REQUESTED:

1) Approve the amendment with MRL Consulting, LLC, and 2) authorize the County Manager to terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

February 5, 2024 - Regular Meeting, Agenda Item #24-094 - The Board approved an extension of the agreement for 11 months, with additional contract terms stating that the County would be MRL Consulting's primary client, that any additional clients be disclosed to and approved by the County, and that any future contract renewal or extension of term options be approved by the Board, with the County Manager authorized to terminate the agreement if deemed in the best interest of the County.

BACKGROUND:

The County Manager's Office is requesting an extension of the consulting services Agreement with MRL Consulting, LLC, led by Michelle Lancaster, until December 31, 2025. Since her retirement from employment with Union County, Michelle has been an invaluable asset to the County, providing her expertise in critical ongoing projects to help usher those projects toward successful completion. The consulting services currently listed in the Agreement include: assistance with opioid settlement funding, liaising with the County's legislative delegation at the General Assembly and with the County's contract lobbyist, assistance with planning and coordination of provider(s) in the Union County Public Health Department Inmate Health Program due to retirements, facilitation and assistance with coordination efforts regarding the potential Union County Jail expansion project, assisting with the Regional Autopsy Center, and other projects as requested. Some of these listed services have been completed or have been updated over time, as allowed by the Agreement, due to changing County plans or priorities. The consulting services are currently being provided at a cost of \$6,000 per month, for a total of \$102,000 from the Agreement's effective date on August 1, 2023, through December 31, 2024. The amendment requested would revise the consulting services provided by MRL Consulting, narrowing the focus of the services to one key project: helping to get the new Regional Autopsy Center up and running. MRL Consulting has been effective and efficient in meeting our service needs, and we believe the County can greatly benefit from her services on this important regional project. Because the consulting services will be narrower in scope, the monthly fee for this service is being revised to \$4,500 per month. In order to ensure a successful start to the new Regional Autopsy Center over the coming months, we are requesting to continue contracting with

MRL Consulting for an additional 12 months. The Agreement currently ends on December 31, 2024; this amendment would extend the term through December 31, 2025.

FINANCIAL IMPACT:

The anticipated annual cost for this contract extension is \$54,000 and is budgeted accordingly for FY2025.

STATE OF NORTH CAROLINA

AMENDMENT #2

COUNTY OF UNION

THIS AMENDMENT, made and entered into this _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina (“Union” or the “County”), and MRL CONSULTING, LLC, a North Carolina limited liability company (the “Consultant”), shall modify and supersede as indicated the agreement between the parties dated August 4, 2023, as modified by amendment dated February 26, 2024 (hereafter, the “Agreement”).

W I T N E S S E T H

WHEREAS, the capitalized defined terms in the Agreement have the same meaning when appearing in this Amendment; and

WHEREAS, the County entered into the Agreement with Consultant for the performance of certain consulting services, as those Services are described further in the Agreement; and

WHEREAS, the County desires to amend the Services performed by the Consultant; and

WHEREAS, the County and the Consultant desire to extend the term of the Agreement through December 31, 2025.

NOW THEREFORE, in consideration of the parties’ continuing obligations under the Agreement and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto do each contract and agree with the other as follows:

1. Delete the services listed in items a. through f. of Section 1 of the Agreement and replace them with the following:

Regional Autopsy Center: Help identify a location for the new regional autopsy center in Union County, craft a project plan for implementation, and perform other related tasks as required based on legislative action and state funding.

2. Modify the first sentence of Section 2 such that the Consultant’s monthly fee is now \$4,500. The sentence shall now read as follows:

Union shall pay Consultant \$4,500 per month for performance of the Services.

3. Delete the second sentence of Section 3 of the Agreement and replace it with the following:

This Agreement shall run through December 31, 2025.

4. This Amendment shall be effective upon execution.
5. Except as herein amended, the terms and provisions of the Agreement shall remain in full force and effect.
6. Each signatory below warrants that it has the corporate or other organizational power and authority to execute, deliver, and perform this Amendment. Each signatory further warrants that the execution, delivery, and performance by it of this Amendment and the Agreement has been duly authorized and approved by all requisite action of the party's management and appropriate governing body.

IN WITNESS WHEREOF, the parties hereto have hereunto set their hands and seals and have caused this Amendment to be executed by their duly authorized representatives, this the day and year first above written.

UNION COUNTY

By: _____ (SEAL)
Brian W. Matthews, County Manager

MRL Consulting, LLC

By: _____ (SEAL)
Michelle Lancaster

Approved as to Legal Form CAM

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

Deputy Finance Officer



Union County, NC

Staff Report

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

File #: 24-851

Agenda Date: 12/16/2024

TITLE:

Appointment of Commissioners to Board and Committees

INFORMATION CONTACT:

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

ACTION REQUESTED:

Appoint Commissioners to fill positions on Boards and Committees.

PRIOR BOARD ACTIONS:

December 2, 2024, Regular Meeting, Agenda Item # 24-819 - Board appointed Commissioner Gary Sides to the Monroe Union County Economic Development Commission.

BACKGROUND:

None.

FINANCIAL IMPACT:

None.

Boards and Committees Appointments		2024-2025 Appointments
Agricultural Advisory Board		
Catawba River Water Supply Project Governing Board		
Centralina Council of Governments	Vice Chair Brian W. Helms Alternate: All Commissioners	
Centralina Economic Development Commission		
Economic Development Board of Advisors	Commissioner Melissa Merrell	
Monroe-Union County Economic Development Commission	Two Commissioner Appointments* *Comm. Merrell currently serving	Chair Melissa Merrell and Commissioner Gary Sides
Fire Commission	Vice Chair Brian W. Helms	
Human Services Board		
Job Ready Partnership Council		
Juvenile Crime Prevention Council		
Library Board of Trustees		
Local Emergency Planning Committee		
Charlotte Regional Transportation Planning Org.	Vice Chair Brian W. Helms Alternate:	
Parks and Recreation Advisory Board	Commissioner Melissa Merrell	
Rocky River Rural Planning Organization Transportation Advisory Committee	Commissioner Melissa Merrell Alternate:	
South Piedmont Community College	Jerry Simpson (Re-appointed on June 3, 2024 – Term expires: June 30, 2028) (Does not require a new appointment)	No appointment needed
School Liaison	Chairman Vice Chairman	
Transportation Advisory Board (Transit System)	No Appointment made at 12/04/2023	

<p>Yadkin River Water Supply Project Advisory Board</p>	<p>*Two Commissioner Appointments Commissioner Melissa Merrell currently serving in one position</p>	
<p>Partners Board of Directors</p>	<p>Commissioner David Williams (re-appointed June 3, 2024 – term expires June 30, 2027) (Does not require a new appointment)</p>	<p>No appointment needed</p>