

Union County, NC

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



Meeting Agenda

Monday, October 20, 2025

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

Visitor Advisory

Due to construction on the first floor of the UC Government Center, the primary entrance off Main Street Plaza is closed. Throughout construction, visitors should follow signage to enter or exit the facility. For meetings of the Board of County Commissioners, two temporary entrances will be available. Meeting attendees may enter via Main Street Plaza (near the intersection of W. Crowell St. and N. Stewart St.) or via the ground floor of the Government Center (off N. Church St.). To learn more about the project or view a project map, visit ucgov.info/PardonOurProgress.

Closed Session - 5:15 PM[25-668](#)**Closed Session****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

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

FINANCIAL IMPACT:

None.

Opening of Meeting - 6:00 PM

Invocation - Chair Melissa Merrell

Pledge of Allegiance

Informal Comments**Public Hearing(s)**[25-624](#)**Public Hearing - Step 4 Economic Development Incentive Grant to McGee Corporation (Project Canopy)****INFORMATION CONTACT:**

Ron Mahle, Economic Development, Director, 980-476-5279

ACTION REQUESTED:

Conduct Public Hearing.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Economic Development Department started conversations with McGee Corporation under codename Project Canopy

in late 2024 about the potential relocation of their manufacturing operation from Stallings, North Carolina, to a 60-acre parcel located off Goldmine Road. The company is considering the purchase of 60-acres, the construction of a 366,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$40,000,000.

McGee Corporation is a fourth-generation existing manufacturer located in Stallings, North Carolina. The company is an industry leader in the production of steel-frame canopy systems used at fueling stations and other custom architectural applications. Current employment at McGee Corporation is 163 people earning an average annual salary of \$63,000.

Due to exceptional growth in their business, they have outgrown the capacity at their current location and are searching for a site which will accommodate future growth.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 4 Economic Development Incentive Grant in an amount-not-to-exceed \$696,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's projected investment of approximately \$40,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new taxable investment in the amount of \$868,400 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current number of employees located within Union County.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$696,000 but would generate approximately \$868,400 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

Staff Recognition

25-660**Board of Elections Employees Earn National Certification****INFORMATION CONTACT:**

Kristin Holloway, Board of Elections, Director, 704-283-3710

ACTION REQUESTED:

Recognize Board of Elections employees, Sharon Jordan and Candace Lopez, for earning the national Certified Elections Registration Administrator (CERA) designation.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Sharon Jordan and Candace Lopez, Election Coordinators for the Union County Board of Elections, were both designated as a Certified Elections/Registration Administrator (CERA), the highest professional achievement, in a ceremony conducted by the Election Center on August 22, 2025.

CERA designation is achieved through a multi-year course of study taught by the Auburn University MPA faculty and conducted by the Election Center's Professional Education Program. The program promotes and supports continuous improvement in the administration of elections and voter registration through research, professional education, conferences, networking and consulting.

Jordan has been employed by Union County since 2018 and Lopez since 2014. Both have earned the North Carolina Elections Administrator designation and are members of the National Association of Election Officials, which is comprised of voter registrars and election administrators throughout America and the U.S. Territories.

FINANCIAL IMPACT:

None.

25-661**Board of Elections Earns National Award****INFORMATION CONTACT:**

Kristin Holloway, Board of Elections, Director, 704-283-3710

ACTION REQUESTED:

Recognize the Board of Elections for earning an Honorable Mention in the U.S. Election Assistance Commission's (EAC) 2024 Clearinghouse Awards program.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Board of Elections has received an Honorable Mention from the U.S. Election Assistance Commission (EAC) in the 2024 Clearinghouse Awards. This recognition was awarded for the Board of Election's successful and engaging "I Voted" Sticker contest, which showcased innovation in voter outreach and civic engagement.

Union County's sticker contest earned high marks from an independent panel of judges, comprising of current and former election officials, EAC Commissioners, and members of the EAC's advisory boards. Across the United States, 53 jurisdictions received Honorable Mentions, alongside 44 official award winners. Jurisdictions honored ranged from small counties to large states, reflecting a broad spectrum of excellence in election administration. Each year, the EAC honors outstanding achievement in election administration through the Clearinghouse Awards.

Established under the Help America Vote Act of 2002 (HAVA), the EAC serves as a national clearinghouse for election information, and the awards are a key part of that mission. The awards recognize innovation, sustainability, outreach, cost-effectiveness, replicability, and positive impact.

FINANCIAL IMPACT:

None.

Consent Agenda

25-641

Bid Award - FY2022 Short Water Line Extension Program Phase A

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Award contract to Classic City Mechanical, Inc. in the amount of \$2,007,041.00; 2) authorize the County Manager to a) negotiate and execute an agreement with Classic City Mechanical, Inc. substantially consistent with this agenda item, b) exercise any renewal or extension term options set forth in the agreement, and c) terminate the agreement if deemed in the best interest of the County, each in the County Manager's discretion; and 3) adopt Resolution Providing Notice of Construction of the FY2022 Short Water Line Extension Program Phase A.

PRIOR BOARD ACTIONS:

- 1) August 16, 2021, Regular Meeting, Agenda Item # 40 - Approved the ranking criteria, cost share, and application period for the Short Water Line Extension Program.
- 2) February 7, 2022, Regular Meeting, Agenda Item # 22-011 - Approved the FY2022 Short Water Line Extension Program applicant selections.
- 3) April 4, 2022, Regular Meeting, Agenda Item # 22-178 - Approved the selection of two additional projects for the FY2022 Short Water Line Extension Program.
- 4) September 6, 2022, Regular Meeting, Agenda Item # 22-531 - Approved moving forward with the selected FY2022 Short Water Line Extension Program selected projects based on applicants' fee payments.
- 5) August 14, 2023, Regular Meeting, Agenda Item # 23-489 - Approved

Task Order 2021-10 with WK Dickson & Co., Inc. for engineering design services for the FY2022 Short Water Line Extension Program Phases A & C

BACKGROUND:

The Short Water Line Extension Program, as adopted by the Board of County Commissioners (BOCC), provides for the extension of water lines to serve and provide an environmental benefit to qualifying applicants in Union County. The FY2022 Short Water Line Extension Program projects have been divided into four Phases (A - D). Phase A consists of four projects with approximately 2.4 miles of water lines serving 16 applicants on E Old Dutch Road, Jack Connell Road, Deepwood Place, Sherin Lane, Sikes Mill Road, Braswell Rushing Road, Tyler Ridge Court, and Clontz Long Road.

The BOCC previously approved WK Dickson & Co., Inc Task Order 2021-10 for engineering design services for Phases A and C on August 14, 2023, in the amount of \$556,600.00.

On September 3, 2025, the Procurement Department partnered with the Union County Water to issue an Invitation for Bid IFB 2026-012 - FY2022 Short Water Line Extension Program Phase A. On September 30, 2025, five (5) bids for the title project were received and processed. All bids were tabulated, reviewed, and certified by WK Dickson & Co., LLC d/b/a Ardurra Group North Carolina. The bids ranged from \$2,007,042.55 to \$3,876,127.50; staff recommends that the project be awarded to the lowest responsive, responsible bidder, Classic City Mechanical, Inc., in the amount of \$2,007,042.55.

FINANCIAL IMPACT:

Funding is available within the adopted capital account 60184128 FY2022 Short Water Line Extensions Program to support the construction contract amount of \$2,007,042.55 with Classic City Mechanical, Inc.

25-627

Step 4 Economic Development Incentive Grant - Project Seven

INFORMATION CONTACT:

Ron Mahle, Economic Development, Director, 980-476-5279

ACTION REQUESTED:

Confirm the Board's action on July 14, 2025 (Agenda Item 25-425), involving the award of a Step 4 Economic Development Incentive Grant to Confidential Company (Project Seven) in an amount not-to-exceed \$4,860,000 over a seven-year period was an award of such incentive grant to ATI Specialty Materials, LLC.

PRIOR BOARD ACTIONS:

July 14, 2025, Regular Meeting, Agenda Item #25-424 - Public Hearing;
July 14, 2025, Regular Meeting, Agenda Item #25-425- Union County Board of Commissioners award of Step 4 Economic Development Incentive Grant to Confidential Company - Project Seven

BACKGROUND:

At its July 14, 2025, regular meeting, the Union County Board of Commissioners awarded a Step 4 Economic Development Incentive Grant to Confidential Company - Project Seven. The grant is in an amount not-to-exceed \$4,860,000 paid over a 7-year period beginning in FY2028. The name of the company is ATI Specialty Materials, LLC.

FINANCIAL IMPACT:

\$4,860,000 paid over a 7-year period beginning in FY2028.

25-633**Grant Application - Meals on Wheels America 2025-26 Waitlist Grant****INFORMATION CONTACT:**

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Meals on Wheels America, in partnership with Food Lion Feeds, has established a funding opportunity to help address growing waitlists for home-delivered meals across the country. These funds are intended to support local programs by providing general operations and infrastructure investments that will expand capacity and reduce wait times.

Union County has been identified as a recipient of these funds, which have been set aside for our Senior Nutrition Program. To access the funding, the County must complete an application form and accept the associated terms and conditions. The funding is \$77,000 and will primarily be used to purchase a vehicle for the Senior Nutrition Program. This vehicle will be used to deliver meals to homebound seniors and staff will use it when completing the required annual in-home visits for all clients, as mandated by North Carolina Department of Health and Human Services - Division of Aging. The additional vehicle capacity will help strengthen program operations and ensure that more seniors in Union County receive timely, reliable nutrition and support services.

Any funds remaining after the vehicle purchase are unrestricted and may be used to support other program needs, such as shelf-stable meals, computer equipment for staff, or craft and activity supplies for congregate meal site participants.

FINANCIAL IMPACT:

The grant award is \$77,000 with no required match.

25-643**Grant Application - Transportation FY2026 Rural Operating Assistance Program, FY2027 Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program and FY2027 FTA 5303 Transit Planning Grant****INFORMATION CONTACT:**

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

ACTION REQUESTED:

Authorize the County Manager to submit the associated grant applications and make necessary assurances and certifications associated with the grant applications as substantially consistent with this agenda item, which includes the authorization to execute documents, or delegate electronic execution of documents when use of the federal award management system is required, related to award of the grants and budget funds as appropriate.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Human Services Agency Transportation Department seeks approval to submit applications for three grant programs to support the continued provision and planning of public transportation services for eligible residents, particularly seniors, individuals with disabilities, and residents in rural areas. The grants include:

1. Rural Operating Assistance Program (ROAP) - FY26

ROAP is a State-funded, formula-based program administered by the NC Department of Transportation - Integrated Mobility Division (NCDOT-IMD). Union County expects to receive \$278,783 in FY26 ROAP funding to support operating costs only (no administrative or capital expenses) for eligible trips in the following categories:

- Elderly & Disabled Transportation Assistance Program (EDTAP) - \$125,890
- Employment Transportation Assistance Program (EMPL) - \$46,526
- Rural General Public (RGP) - \$106,367

Funds may cover up to 100% of the fully allocated trip cost with no local match required. While EDTAP funds must remain in their designated category, EMPL and RGP funds may be transferred to any program. The period of performance for these funds is July 1, 2025 - June 30, 2026, regardless of the date on which ROAP funds are disbursed to the County.

Eligibility:

- EDTAP: Participants must be either age 60+ or have a physical or mental impairments that substantially limits one or more major life activities, per NC G.S. Article 2B, 136-44.27.
- EMPL: Recipients must meet one of the following criteria: (1) DSS

client who transitioned off Work First or Temporary Assistance for Needy Families (TANF) in the last 12 months; (2) Workforce Development Program participant; (3) Any resident who needs transportation to work, employment training or other related destinations whose work schedule and destination can be accommodated by the local transit system; (4) A child who requires transport to daycare in conjunction with an eligible parent's trip to work.

- RGP: Recipients must reside in a non-urbanized area of the County and need transport for any reason (E.g. medical appointment, educational opportunity, employment, personal business). Additionally, RGP recipients (1) must not qualify under a Human Service Agency to receive transportation or (2) their supporting Human Service Agency must have expended all transportation funding and no longer be able to fund trips.

County governments are the only eligible applicants for ROAP funds, and the County Financial Officer is the DOT-mandated person responsible for overseeing the funding.

2. Enhanced Mobility of Seniors and Individuals with Disabilities - Section 5310 Grant - FY27

The Section 5310 program (49 U.S.C. 5310) provides formula funding to states to assist private nonprofit groups in meeting 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 Division 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. Transportation staff have the capability to manage this grant and have been receiving and managing this 5310 funding since January 2016. FY27 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 over 200 seniors aged 65 and older and/or individuals with disabilities currently being served by our system under this funding.

The FY27 grant application will include:

Operations Funding (Demand Response Service):

- 50% Federal / 50% Local match
- Union County will use its Home and Community Care Block Grant (HCCBG) funds to meet the local match requirement.

Capital Funding:

- 80% Federal / 20% Local match
- Request includes purchase of one (1) 22' Light Transit Vehicle (LTV) with lift and related equipment.

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.

3. Transit Planning Program - Section 5303 Grant - FY27

Federal Transit Administration (FTA) Section 5303 federal transportation funding authorizations are allocated each year by the North Carolina Department of Transportation (NCDOT). 5303 funds are managed locally by the Charlotte Regional Transportation Planning Organization (CRTPO), the federally designated Metropolitan Planning Organization (MPO) for the Charlotte Urbanized Area (UZA). 5303 funding helps UZAs plan for the development, improvement, and effective management of their transportation systems, focusing on planning and administrative activities.

Union County Transportation requests approval to apply for \$174,411 of FY2027 5303 funds, funding is 80% Federal, 10% State, and 10% local match. Funds cover a one (1)-year period of performance from July 1, 2026, to June 30, 2027.

The Human Service Agency Transportation Department plans to use the funding associated with this grant to complete multiple tasks, including:

- Data and Planning Support - Ridership analysis, socio-economic analysis, route analysis.
- Public Participation - Rider Surveys.
- Statewide & Extra Regional Planning - Interagency coordination, state and regional coordination.
- Management, Operations & Program Support Administration - grant development, attending regional and state events.

FINANCIAL IMPACT:

1. Rural Operating Assistance Program (ROAP) - FY2026
 - Total Funding: \$278,783
 - Local Match Required: None
 - This funding is budgeted accordingly for FY2026
2. Section 5310 Grant - FY2027

- Operating Request: \$288,000 (two-year period: July 1, 2027 - June 30, 2029)
 - Federal Share (50%): \$144,000
 - Local Match (50%): \$144,000
 - Capital Request: \$147,878
 - Federal Share (80%): \$118,301
 - Local Match (20%): \$29,577
 - Total Local Match Required for 5310 Grant: \$173,577
3. Section 5303 Planning Grant - FY2027
- Total Grant Request: \$174,411
 - Federal Share (80%): \$139,529
 - State Share (10%): \$17,441
 - Local Share (10%): \$17,441
 - Projected revenue and local share expenditures will be included in the proposed FY2027 budget.

25-630**Resolution - Surplus Vehicle Sale****INFORMATION CONTACT:**

Corey Brooks, Procurement & Contract Management, Interim Director,
704-283-3683

ACTION REQUESTED:

Adopt Resolution Authorizing Surplus Property Sale by Internet Auction which 1) declares the property itemized on Attachment A as "Surplus" to the needs of Union County, 2) authorizes sale at electronic auction of the surplus property described in Attachment A as per the terms and conditions as specified in the online auction service provider contract, and 3) authorizes the Procurement Director or their designee to execute any and all documents necessary to transfer title to said property on behalf of Union County.

BACKGROUND:

North Carolina General Statutes allow the disposition of personal property by local governments through a variety of means including private negotiations and sale; advertisement for sealed bids; negotiated offer, advertisement, and upset bid; public auction; or exchange. In 2001, the legislature amended the Statues to provide for disposition of property through electronic auction.

The sale will begin October 28, 2025, at 9:00 AM and end November 11, 2025, with incremental closings as indicated on Attachment A. A summary of the vehicle information is listed below. Additional vehicle information can be found on Attachment A.

Union County Water

- (2) 2014 FORD F350 SUPERCAB

UCSO

- (1) 2013 DODGE CHARGER
- (1) 2014 DODGE CHARGER
- (1) 2014 FORD EXPLORER
- (1) 2014 CHEVROLET TAHOE
- (1) 2016 CHEVROLET TAHOE
- (1) 2017 CHEVROLET CAPRICE
- (1) 2017 FORD EXPLORER
- (2) 2018 FORD POLICE INTERCEPTOR

Building Code Enforcement

- (1) 2015 FORD F150

Transportation

- (1) 2018 DODGE CARAVAN

The vehicles are to be picked up at 610 Patton Avenue, Monroe, NC with the following terms of sale:

1. Sale to the highest bidder with all sales final.
2. All items sold “as is” with no warranty, expressed or implied, which extends beyond the description of the item.
3. Purchasers must remove vehicles(s) within ten (10) business days from the time and date of issuance of the Buyer’s Certificate.
4. Payment must be made online through the online auction website. Payment in full is due not later than five (5) business days from the time and date of the Buyers Certificate. Payment will not be accepted onsite.

FINANCIAL IMPACT:

Estimated revenue is \$50,000. The revenue will be returned to the fund from which the asset came.

25-635**Grant Application - Firehouse Subs Public Safety Foundation****INFORMATION CONTACT:**

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Fire Marshal's Office is seeking authorization to apply for and, if awarded, accept a grant from the Firehouse Subs Public Safety Foundation in the amount of \$15,000 (no local match). The grant program provides funding to public safety organizations across the nation to enhance emergency response capabilities, improve community safety, and support lifesaving operations through specialized equipment.

The proposed project will fund the purchase of digital cameras and accessories to improve incident documentation, post-disaster damage assessments, and fire investigation capabilities. High-resolution imagery is a critical component of accurate scene evaluation, training, and reporting. These tools will allow the Fire Marshal's Office to collect precise photographic evidence during investigations, emergency incidents, and natural disaster events.

FINANCIAL IMPACT:

Union County anticipates requesting approximately \$15,000 in funding with no local match.

25-622**Purchase - Replacement/Expansion Vehicles****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:

Fleet requests the approval to purchase fourteen (14) replacement and/or expansion vehicles. Seven (7) Social Services Administration vehicles have met their use in life and were approved for replacement in the FY26 budget. One (1) expansion vehicle was approved for Economic Development in the FY26 budget. Four (4) UC Water trucks have met their use in life and were approved for replacement in the FY26 budget. One (1) expansion truck was approved for Facilities Management, and one (1) expansion truck was approved for UC Water in the FY26 Budget. A summary of the replacement/expansion vehicles is below:

Replacements

- (1) 2026 Chevrolet Equinox - Replaces 05-16, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 02-16, Social Services Admin, \$28,795.50

- (1) 2026 Chevrolet Equinox - Replaces 48-14, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 28-13, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 04-16, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 03-16, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 47-14, Social Services Admin, \$28,795.50
- (1) 2026 Ford F250 Service Body - Replaces 17-17, UC Water, \$53,257.70
- (1) 2026 Ford F250 Service Body - Replaces 34-16, UC Water, \$53,257.70
- (1) 2026 Ford F350 Service Body - Replaces 03-15, UC Water, \$70,283.10
- (1) 2026 Ford F350 Service Body - Replaces 35-13, UC Water, \$70,283.10

Expansion

- (1) 2026 Chevrolet Tahoe 4WD - Expansion, Economic Development, \$55,463.25
- (1) 2026 Ford F350 Service Body - Expansion, Facilities Mgt., \$64,041.00
- (1) 2026 Ford F550 Service Body - Expansion, UC Water, \$87,654.30

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 6 Equinox and 1 Tahoe will be made using North Carolina Statewide Term Contract 2510A as quoted by Capital Chevrolet. The purchase of the 6 Ford trucks will be made using North Carolina State Term Contract 2510A as quoted by Piedmont Trucks.

FINANCIAL IMPACT:

The anticipated cost for the vehicles is \$655,808.65 and is budgeted accordingly for FY2026. Of this, \$257,031.75 will cover the purchase of 6 Equinox and 1 Tahoe and \$398,776.90 will cover the purchase of 6 Ford Trucks.

25-640**Contract Amendment - Additional Design Services for the South Piedmont Regional Autopsy Center****INFORMATION CONTACT:**

Linda Whitaker, Facilities and Fleet Management, Assistant Director Design and Construction, 704-420-2626

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:

May 05, 2025, Regular Meeting, Agenda Item # 25-215 - Approved Design Contract with CPL Architects & Engineers, PC for Advanced Planning/Conceptual Design Phase

BACKGROUND:

This request is to approve a contract amendment with CPL to provide full building and site design and construction administration services for the South Piedmont Regional Autopsy Center project. The project includes a new building between 13,000 and 15,000 gross square feet, site work and utilities and will be located on the parcel adjacent to the Union County Sheriff's Office Campus. The cost of this amendment is \$1,669,225.00, bringing the revised total fee to \$1,885,425.00. Staff recommends approval of this contract amendment to continue design services for a full building and site design for the project.

FINANCIAL IMPACT:

The cost for this amendment is \$1,669,225.00. There are sufficient funds in capital account 40080222 South Piedmont Regional Autopsy Center project to cover this expense.

25-645

Adoption of Updated Records Retention Schedules

INFORMATION CONTACT:

Clayton T. Voignier, Assistant County Manager, 704-283-3687; Jason Kay, County Attorney, 704-283-3784

ACTION REQUESTED:

Adopt the 2021 General Records Schedule and 2021 Program Records Schedule for Local Government Agencies for Union County effective October 20, 2025

PRIOR BOARD ACTIONS:

Union County's General Records Schedule was last updated on August 5, 2019

BACKGROUND:

In April 2013, Union County adopted a Records Retention and Disposition Schedule for County Management, which governed how long the County must retain various types of county records to comply with North Carolina law. All records retention and disposition schedules are published and periodically updated by the North Carolina Department of Natural and Cultural Resources Division of Archives and Records ("NC Archives").

In 2019, Government Records were combined into a General Records Schedule for Local Government Agencies, and Union County adopted a General Records Schedule for Local Government Agencies in August of 2019.

In October of 2021, NC Archives published an updated General Records

Schedule for Local Government Agencies and a new Program Records Schedule for Local Government Agencies. The 2021 General Records Schedule for Local Government Agencies reorganized and updated the 2019 version to improve clarity and consistency. The most noticeable change is the renaming of the "Personnel Records" section to "Human Resources Records." Several record series were consolidated or clarified to eliminate redundancy, and terminology was updated to reflect electronic recordkeeping practices.

The 2021 Program Records Schedule for Local Government Agencies was a new retention schedule created from the former County Management (last updated in 2013) and Municipal (last updated in 2012) retention schedules. This schedule contains specific functions of government at the county level including Code Enforcement and Inspection Records, Parks and Recreation Records, Planning and Regulation of Development Records, Public Transportation Systems Records, Public Utilities and Environmental/Waste Management Records, and Street Maintenance, Public Works, and Engineering Records. Most retention periods remain consistent with prior guidance, though descriptions and organization were modernized to improve clarity and align with the format of the General Records Schedule.

Adoption of the 2021 General Records Schedule and Program Records Schedule for Local Government Agencies will supersede prior versions of these schedules and authorize the County to dispose of records in accordance with State-approved destruction methods.

FINANCIAL IMPACT:

None

25-652

Tax Bill Correction Report for September 2025

INFORMATION CONTACT:

Michael Thompson, Tax Administration, Deputy Tax Administrator,
704-283-3624

ACTION REQUESTED:

Tax Bill Correction Reports for September 2025

PRIOR BOARD ACTIONS:

None

BACKGROUND:

In accordance with North Carolina General Statutes 102-312 and 105-325, the Board of County Commissioners is authorized to make and approve certain changes to property tax records. Approval of such changes may result in either a release, refund, or discovery of ad valorem taxes. The attached report provides detailed information on all tax bills that were modified. Included in the report for each correction is the parcel number or property key, owner name, reason for the change, original value, original tax, corrected value, corrected tax, and refund, if applicable.

FINANCIAL IMPACT:

September Refund amount = \$7258.82

25-657

Amendment to the Union County Pay and Classification Plan

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Approve a revision of the Union County Pay and Classification Plan to include the following:

A) Add the following classification title and associated pay grade:

i) Animal Services Supervisor - pay grade I

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.

FINANCIAL IMPACT:

No additional funds required.

25-639

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Draft minutes have been provided to the Board of Commissioners for review and approval on the Consent Agenda.

FINANCIAL IMPACT:

None.

Information Only

25-623

Communications Monthly Report - September 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

25-625**Contract Report July - September 2025****INFORMATION CONTACT:**

Corey Brooks, Procurement & Contract Management, Interim Director,
704-283-3683

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Per Section XVIII of the FY 2026 adopted Operating and Capital Budget Ordinance, the contract report lists executed contracts and purchase orders that were entered into by the County Manager or Procurement designee from July through September 2025.

FINANCIAL IMPACT:

As noted on contracts and purchase orders.

25-646**Wastewater Treatment Capacity - Monthly Update****INFORMATION CONTACT:**

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

ACTION REQUESTED:

None - Information Only.

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 September 2025 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 70.0%
- Percent of Actual + Permitted Flows = 89.1%
- Actual Flows (MGD) = 5.253
- Actual + Permitted Obligated Flows (MGD) = 6.682

Crooked Creek

- Percent of Actual Flows = 59.4%
- Percent of Actual + Permitted Flows = 88.7%
- Actual Flows (MGD) = 1.129
- Actual + Permitted Obligated Flows (MGD) = 1.686

Olde Sycamore

- Percent of Actual Flows = 26.0%
- Percent of Actual + Permitted Flows = 26.0%
- Actual Flows (MGD) = 0.039
- Actual + Permitted Obligated Flows (MGD) = 0.039

Tallwood

- Percent of Actual Flows = 44.0%
- Percent of Actual + Permitted Flows = 44.0%
- Actual Flows (MGD) = 0.022
- Actual + Permitted Obligated Flows (MGD) = 0.022

Grassy Branch

- Percent of Actual Flows = 86.0%
- Percent of Actual + Permitted Flows = 88.0%
- Actual Flows (MGD) = 0.043
- Actual + Permitted Obligated Flows (MGD) = 0.044

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 September 2025 are summarized in the attached tables.

FINANCIAL IMPACT:

None.

25-648**South Piedmont Regional Autopsy Center - October 2025 Quarterly Report****INFORMATION CONTACT:**

Stephanie Dudley, County Manager's Office, Business Manager,
704-292-2668

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This is the quarterly progress report on the operations of the South Piedmont Regional Autopsy Center (SPRAC).

FINANCIAL IMPACT:

None.

Business**25-626****Consider a Step 4 Economic Development Incentive Grant to McGee Corporation (Project Canopy)****INFORMATION CONTACT:**

Ron Mahle, Economic Development, Director, 980-476-5279

ACTION REQUESTED:

- 1) Award a Step 4 Economic Development Incentive Grant in an amount

not to exceed \$696,000 over a 5-year period and 2) authorize the County Manager to a) negotiate and execute an agreement substantially consistent with this agenda item, b) exercise any renewal or extension term options set forth in the Agreement, and c) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

October 20, 2025, Regular Meeting, Agenda Item # 25-624 - Public Hearing Conducted.

BACKGROUND:

The Union County Economic Development Department started conversations with McGee Corporation under codename Project Canopy in late 2024 about the potential relocation of their manufacturing operation from Stallings, North Carolina, to a 60-acre parcel located off Goldmine Road. The company is considering the purchase of 60-acres, the construction of a 366,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$40,000,000.

McGee Corporation is a fourth-generation existing manufacturer located in Stallings, North Carolina. The company is an industry leader in the production of steel-frame canopy systems used at fueling stations and other custom architectural applications. Current employment at McGee Corporation is 163 people earning an average annual salary of \$63,000.

Due to exceptional growth in their business, they have outgrown the capacity at their current location and are searching for a site which will accommodate future growth.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 4 Economic Development Incentive Grant in an amount-not-to-exceed \$696,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's projected investment of approximately \$40,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new taxable investment in the amount of \$868,400 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current

number of employees located within Union County.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$696,000 but would generate approximately \$868,400 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

25-642

Union County Land Preservation & Easement Program Update

INFORMATION CONTACT:

Alan Aldridge, Soil & Water Conservation, District Director, 704-233-1621 Ext. 3

ACTION REQUESTED:

1) Approve the allocation of funds, from Budget 10115410-5630-11115, for the purchase of Easements 90-2026-001, 90-2026-002, 90-2026-003, and 90-2026-004 in the amount of \$854,180; and 2) accept Easements 90-2026-001, 90-2026-002, 90-2026-003, and 90-2026-004 into the Union County Land Preservation & Easement Program.

PRIOR BOARD ACTIONS:

1) November 6, 2023, Regular Meeting, Agenda Item # 23-755 - a) Approved the Union County Soil & Water Conservation District to purchase and hold conservation easements for land preservation in Union County; and b) adopted Budget Amendment # 14 appropriating the County's General Fund unassigned fund balance in the amount of \$969,006 to be used for the purchase of conservation easements and associated transaction costs.

2) February 3, 2025, Regular Meeting, Agenda Item # 25-047 - a) Adopted the Union County land preservation & easement ordinance; b) approved the allocation of funds from BUDGET 10115410-5630-11115 for the purchase of Easement 90-2025-001 for the amount of \$721,575.00; c) accepted Easement 90-2025-001 into the Union County Land Preservation & Easement Program; d) accepted the donation of Easement 90-2025-002 into the Union County Land Preservation & Easement Program; e) adopted Budget Amendment 22 appropriating the County's General Fund unassigned fund balance in the amount of \$885,991.90 to be used for the purchase of conservation easements and associated transaction costs.

BACKGROUND:

Union County is currently ranked 13th in the United States for open space land loss on a per year basis according to the latest research published by the American Farmland Trust. Over the last four fiscal years, Union County has lost 3,191 acres (FY2020), 2,892 acres (FY2021), 3,625 acres (FY2022), and 2,419 acres (FY2023) from parcels enrolled in present use value (PUV) alone. According to the 2022 NCDA Census of

Agriculture, Union County has 186,626 acres of farmland. In the Business-as-Usual scenario published by NC FarmLink, Union County is slated to lose 51,500 acres of current farmland by 2040. This scenario would represent approximately a 28% reduction in total farmland acreage in Union County by 2040.

The Union County Land Preservation & Easement program allows landowners to sell and/or donate the development rights to their property while still obtaining ownership of the land. By selling and/or donating the development rights, open space and agricultural land will be preserved through conservation easements held by the Union County Soil & Water Conservation District. The District will be responsible for monitoring and inspections of easements to maintain compliance within the program. The use of present use value (PUV) rollback funds will provide financial resources to the Union County Soil & Water Conservation District for the easement purchases and all associated transaction costs. These funds are held in a Union County budget line and all non-encumbered funds will rollover at the end of each fiscal year.

FINANCIAL IMPACT:

\$854,180 for the purchase of Easements 90-2026-001, 90-2026-002, 90-2026-003, and 90-2026-004.

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 #: 25-668

Agenda Date: 10/20/2025

TITLE:

Closed Session

INFORMATION CONTACT:

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

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

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 25-624

Agenda Date: 10/20/2025

TITLE:

Public Hearing - Step 4 Economic Development Incentive Grant to McGee Corporation (Project Canopy)

INFORMATION CONTACT:

Ron Mahle, Economic Development, Director, 980-476-5279

ACTION REQUESTED:

Conduct Public Hearing.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Economic Development Department started conversations with McGee Corporation under codename Project Canopy in late 2024 about the potential relocation of their manufacturing operation from Stallings, North Carolina, to a 60-acre parcel located off Goldmine Road. The company is considering the purchase of 60-acres, the construction of a 366,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$40,000,000.

McGee Corporation is a fourth-generation existing manufacturer located in Stallings, North Carolina. The company is an industry leader in the production of steel-frame canopy systems used at fueling stations and other custom architectural applications. Current employment at McGee Corporation is 163 people earning an average annual salary of \$63,000.

Due to exceptional growth in their business, they have outgrown the capacity at their current location and are searching for a site which will accommodate future growth.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 4 Economic Development Incentive Grant in an amount-not-to-exceed \$696,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's projected investment of approximately \$40,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new taxable investment in the amount of \$868,400 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax

Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current number of employees located within Union County.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$696,000 but would generate approximately \$868,400 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

MONROE ENQUIRER JOURNAL

Affidavit of Publication

State of North Carolina,
Union County

To Whom it May Concern:
this is to certify the
advertisement attached
hereto has been published in

Monroe Enquirer Journal

On the following dates:

October 8, 2025

Ad # 71333911

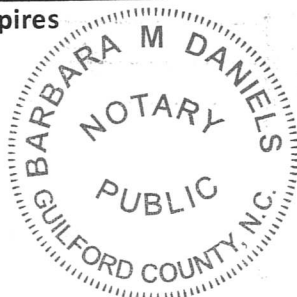
Sworn to on this 8 day
of October, 2025

Kimberly Cook
Billing Clerk

Sworn to and Subscribed
before me this 8 day
of October, 2025

Barbara M Daniels
Notary Public

March 9, 2027
My Commission Expires



PUBLIC NOTICE

NOTICE IS HEREBY GIVEN that the Union County Board of Commissioners will hold a public hearing on Monday, October 20, 2025, beginning at 6:00 p.m. in the Commissioners Board Room located on the first floor of the Union County Government Center, 500 North Main Street, Monroe, North Carolina, to consider the provision of economic development incentives pursuant to N.C.G.S. 158-7.1. The Board of Commissioners intends to consider awarding a STEP 4 Economic Development Incentive Grant to McGee Corporation, in an amount not to exceed \$696,000. This grant would be paid over a five-year period beginning in FY 2028. Based on the current tax rate and assuming a consistent assessed value with no depreciation, the ad valorem taxes paid to the County would be \$868,400 over the five-year grant period. Actual tax revenue to the County will be based upon the actual assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments. The incentive grant would be paid in five (5) annual payments based upon the appraised value of the capital investment each year as appraised by the Union County Tax Administration Office. The maximum incentive grant amount would be \$696,000 with a maximum annual grant payment of \$139,200. This grant is based on the company's projected total capital investment of \$40,000,000 in land purchase, building construction and the purchase and installation of production equipment during the grant period and retaining its current number of jobs located in Union County.

The proposed grant recipient acknowledges that the incentive grant, if awarded by the Board, will serve as an inducement to make the indicated capital investments in Union County. The source of funding for the proposed grant is general fund revenues. The public benefit expected to be derived from this project includes, without limitation, property taxes collected related to the project and retention of jobs located in Union County.

Any person requesting a sign language interpreter or any person requesting any other special assistance needed due to disability under the Americans with Disabilities Act should call 704.283.3810 and make a request at least 96 hours in advance.

Visitor Advisory for Board of Commissioners Meetings

Due to construction on the first floor of the Government Center, the main entrance off Main Street Plaza will be closed. Throughout construction, all visitors will need to follow signs to enter and exit the facility via a temporary entrance. For meetings of the Board of County Commissioners, two temporary entrances will be available. Visitors may follow signage to a temporary entrance off Main Street Plaza (near the intersection of W. Crowell St. and N. Stewart St.) or to a temporary entrance via the ground floor of the Government Center, off N. Church Street. To learn more about the project or to view a project map, visit ucgov.info/PardonOurProgress.

Lynn G. West
County Clerk
Union County Board of Commissioners

Publish: Wednesday, October 8, 2025



Union County, NC

Staff Report

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

File #: 25-660

Agenda Date: 10/20/2025

TITLE:

Board of Elections Employees Earn National Certification

INFORMATION CONTACT:

Kristin Holloway, Board of Elections, Director, 704-283-3710

ACTION REQUESTED:

Recognize Board of Elections employees, Sharon Jordan and Candace Lopez, for earning the national Certified Elections Registration Administrator (CERA) designation.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Sharon Jordan and Candace Lopez, Election Coordinators for the Union County Board of Elections, were both designated as a Certified Elections/Registration Administrator (CERA), the highest professional achievement, in a ceremony conducted by the Election Center on August 22, 2025.

CERA designation is achieved through a multi-year course of study taught by the Auburn University MPA faculty and conducted by the Election Center's Professional Education Program. The program promotes and supports continuous improvement in the administration of elections and voter registration through research, professional education, conferences, networking and consulting.

Jordan has been employed by Union County since 2018 and Lopez since 2014. Both have earned the North Carolina Elections Administrator designation and are members of the National Association of Election Officials, which is comprised of voter registrars and election administrators throughout America and the U.S. Territories.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 25-661

Agenda Date: 10/20/2025

TITLE:

Board of Elections Earns National Award

INFORMATION CONTACT:

Kristin Holloway, Board of Elections, Director, 704-283-3710

ACTION REQUESTED:

Recognize the Board of Elections for earning an Honorable Mention in the U.S. Election Assistance Commission's (EAC) 2024 Clearinghouse Awards program.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Board of Elections has received an Honorable Mention from the U.S. Election Assistance Commission (EAC) in the 2024 Clearinghouse Awards. This recognition was awarded for the Board of Election's successful and engaging "I Voted" Sticker contest, which showcased innovation in voter outreach and civic engagement.

Union County's sticker contest earned high marks from an independent panel of judges, comprising of current and former election officials, EAC Commissioners, and members of the EAC's advisory boards. Across the United States, 53 jurisdictions received Honorable Mentions, alongside 44 official award winners. Jurisdictions honored ranged from small counties to large states, reflecting a broad spectrum of excellence in election administration. Each year, the EAC honors outstanding achievement in election administration through the Clearinghouse Awards.

Established under the Help America Vote Act of 2002 (HAVA), the EAC serves as a national clearinghouse for election information, and the awards are a key part of that mission. The awards recognize innovation, sustainability, outreach, cost-effectiveness, replicability, and positive impact.

FINANCIAL IMPACT:

None.



Union County, NC

Staff Report

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

File #: 25-641

Agenda Date: 10/20/2025

TITLE:

Bid Award - FY2022 Short Water Line Extension Program Phase A

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Award contract to Classic City Mechanical, Inc. in the amount of \$2,007,041.00; 2) authorize the County Manager to a) negotiate and execute an agreement with Classic City Mechanical, Inc. substantially consistent with this agenda item, b) exercise any renewal or extension term options set forth in the agreement, and c) terminate the agreement if deemed in the best interest of the County, each in the County Manager's discretion; and 3) adopt Resolution Providing Notice of Construction of the FY2022 Short Water Line Extension Program Phase A.

PRIOR BOARD ACTIONS:

- 1) August 16, 2021, Regular Meeting, Agenda Item # 40 - Approved the ranking criteria, cost share, and application period for the Short Water Line Extension Program.
- 2) February 7, 2022, Regular Meeting, Agenda Item # 22-011 - Approved the FY2022 Short Water Line Extension Program applicant selections.
- 3) April 4, 2022, Regular Meeting, Agenda Item # 22-178 - Approved the selection of two additional projects for the FY2022 Short Water Line Extension Program.
- 4) September 6, 2022, Regular Meeting, Agenda Item # 22-531 - Approved moving forward with the selected FY2022 Short Water Line Extension Program selected projects based on applicants' fee payments.
- 5) August 14, 2023, Regular Meeting, Agenda Item # 23-489 - Approved Task Order 2021-10 with WK Dickson & Co., Inc. for engineering design services for the FY2022 Short Water Line Extension Program Phases A & C

BACKGROUND:

The Short Water Line Extension Program, as adopted by the Board of County Commissioners (BOCC), provides for the extension of water lines to serve and provide an environmental benefit to qualifying applicants in Union County. The FY2022 Short Water Line Extension Program projects have been divided into four Phases (A - D). Phase A consists of four projects with approximately 2.4 miles of water lines serving 16 applicants on E Old Dutch Road, Jack Connell Road, Deepwood Place, Sherin Lane, Sikes Mill Road, Braswell Rushing Road, Tyler Ridge Court, and Clontz Long Road.

The BOCC previously approved WK Dickson & Co., Inc Task Order 2021-10 for engineering design services for Phases A and C on August 14, 2023, in the amount of \$556,600.00.

On September 3, 2025, the Procurement Department partnered with the Union County Water to issue an Invitation for Bid IFB 2026-012 - FY2022 Short Water Line Extension Program Phase A. On September 30, 2025, five (5) bids for the title project were received and processed. All bids were tabulated, reviewed, and certified by WK Dickson & Co., LLC d/b/a Ardurra Group North Carolina. The bids ranged from \$2,007,042.55 to \$3,876,127.50; staff recommends that the project be awarded to the lowest responsive, responsible bidder, Classic City Mechanical, Inc., in the amount of \$2,007,042.55.

FINANCIAL IMPACT:

Funding is available within the adopted capital account 60184128 FY2022 Short Water Line Extensions Program to support the construction contract amount of \$2,007,042.55 with Classic City Mechanical, Inc.



OCTOBER 3, 2025

THUY LE

ENGINEER – CAPITAL IMPROVEMENT PROGRAM

UNION COUNTY WATER

500 N. MAIN STREET, SUITE 600

MONROE, NORTH CAROLINA 28112

SUBJECT: IFB# 2026-012 FY22 Short Water Line Extensions – Phase A

Project Number: 20230824.00.CL

Bid Tabulation and Recommendation

Dear Ms. Thuy Le:

Enclosed is the Certified Bid Tabulation for the referenced project. A total of five (5) bids were submitted. The bidders, listed in ascending order of total bid price, are Classic City Mechanical, Inc., Simpson Land Development, LLC, Dawn Development Company, Inc., G.S. Construction Inc. and Richard D. Suggs Construction LLC.

The five (5) bids appear to be complete and compliant with the Contract Documents.

The bid received from Classic City Mechanical, Inc. contained a few minor arithmetic errors associated with the calculation of the Contingency Allowance for the Base Bid and Alternate 1. The Base Bid Contingency Allowance, Total Base Bid (Base Bid + Mobilization + Contingency Allowance), Alternate 1 Contingency Allowance, Total Alternate 1 (Base Bid + Mobilization + Contingency Allowance) and Total Bid (Base Bid + Alternate 1) have been updated accordingly. The error did not impact the outcome of the bids and has been corrected and noted as such in the attached Bid Tabulation.

The bid received from Simpson Land Development, LLC contained a few minor arithmetic errors. The first error is associated with the calculation of the bid price for Item No. 1 – 2" Dia. PVC Water Line of the Base Bid. The second error is associated with the calculation of the bid price



for Item No. 46 – Restoration, Seeding and Mulching of the Alternate 1 Bid. The Subtotal Base Bid, Base Bid Contingency Allowance, Total Base Bid (Base Bid + Mobilization + Contingency Allowance), Subtotal Alternate 1, Alternate 1 Contingency Allowance, Total Alternate 1 (Base Bid + Mobilization + Contingency Allowance), and Total Bid (Base Bid + Alternate 1) have been updated accordingly. The error did not impact the outcome of the bids and has been corrected and noted as such in the attached Bid Tabulation.

The bid received from Richard D. Suggs Construction LLC contained a minor arithmetic error associated with the Total Base Bid (Base Bid + Mobilization + Contingency Allowance). The Total Base Bid (Base Bid + Mobilization + Contingency Allowance) has been updated accordingly. The error did not impact the outcome of the bids and has been corrected as note as such in the attached Bid Tabulation.

The bids submitted by Dawn Development Company, Inc., G.S. Construction, Inc. and Richard D. Suggs Construction LLC did not have the correct Total Bid (Base Bid + Alternate 1) price written in words on the Bid Form. The oversight did not impact the outcome of the bids and has been corrected and noted as such in the attached Bid Tabulation.

All other bids received were found to be free of mathematical errors or oversights. Classic City Mechanical, Inc. is the apparent lowest responsive, responsible bidder. We understand Classic City Mechanical, Inc., has completed successful projects for Union County in the past.

Furthermore, Classic City Mechanical, Inc. is absent or excluded from the SAM (Federal Debarment), Iran Divestment and North Carolina Debarred lists.

Based on the results of this Bid and the information that we have received at this time, I recommend Union County award the contract to Classic City Mechanical, Inc. in the amount of \$2,007,042.55 for the Total Bid (Base Bid + Alternate 1).



We appreciate the opportunity to provide this service for Union County Water, and we are available to address any questions you may have.

Sincerely,

ARDURRA

James T. Lyon, PE

Engineering Manager

Enclosures (1)

C: Jake Berkshire, PE – Senior Project Manager, ARDURRA

BID TABULATION
FY22 Short Water Line Extensions Phase A
Union County
BID DATE: September 30, 2025
ARDURRA# 20230824.00.CL

Classic City Mechanical, Inc.
220 Smithonia Rd
Winterville, GA 30683
License No. 15247

Simpson Land Development, LLC
7420 Secrest Short Cuty Rd
Indian Trail, NC 28079
License No. 106957

Dawn Development Company, Inc.
1815 North Rocky River Rd
Monroe, NC 28110
License No. 50539

GS Construction, Inc.
6404 Buford Highway
Norcross, GA 30071
License No. 105806

Richard D. Suggs Construction. LLC.
4610 Paige Road
Mount Pleasant, NC 28124
License No. 25338

Item No.	Description	Unit	Quantity	Unit Price	Extended Total	Unit Price	Extended Total	Unit Price	Extended Total	Unit Price	Extended Total	Unit Price	Extended Total
BASE BID:													
1	2" dia. PVC Water Line	LF	810	\$33.00	\$26,730.00	\$37.22	\$30,148.20 *	\$63.00	\$51,030.00	\$65.00	\$52,650.00	\$80.00	\$64,800.00
2	6" dia. PVC Water Line	LF	4,500	\$68.00	\$306,000.00	\$50.03	\$225,135.00	\$78.00	\$351,000.00	\$75.00	\$337,500.00	\$100.00	\$450,000.00
3	8" dia. PVC Water Line	LF	4,370	\$77.00	\$336,490.00	\$61.06	\$266,832.20	\$83.00	\$362,710.00	\$100.00	\$437,000.00	\$130.00	\$568,100.00
4	12" DIP Water Line	LF	690	\$131.00	\$90,390.00	\$128.74	\$88,830.60	\$153.00	\$105,570.00	\$200.00	\$138,000.00	\$140.00	\$96,600.00
5	6" dia. RJ DIP	LF	1,300	\$96.50	\$125,450.00	\$102.45	\$133,185.00	\$98.00	\$127,400.00	\$125.00	\$162,500.00	\$100.00	\$130,000.00
6	8" dia. RJ DIP	LF	2,260	\$109.00	\$246,340.00	\$116.13	\$262,453.80	\$123.00	\$277,980.00	\$150.00	\$339,000.00	\$140.00	\$316,400.00
7	12" dia. RJ DIP	LF	320	\$139.00	\$44,480.00	\$162.77	\$52,086.40	\$163.00	\$52,160.00	\$220.00	\$70,400.00	\$180.00	\$57,600.00
8	20" dia. Steel Casing (t=0.250"), No Carrier Pipe, Jack & Bore	LF	90	\$450.00	\$40,500.00	\$1,109.68	\$99,871.20	\$425.00	\$38,250.00	\$700.00	\$63,000.00	\$2,000.00	\$180,000.00
9	24" dia. Steel Casing (t=0.250"), No Carrier Pipe, Jack & Bore	LF	150	\$570.00	\$85,500.00	\$1,287.97	\$193,195.50	\$625.00	\$93,750.00	\$850.00	\$127,500.00	\$2,000.00	\$300,000.00
10	16" dia. Steel Casing (t=0.250"), No Carrier Pipe, Open Cut	LF	20	\$236.00	\$4,720.00	\$292.21	\$5,844.20	\$150.00	\$3,000.00	\$250.00	\$5,000.00	\$500.00	\$10,000.00
11	20" dia. Steel Casing (t=0.250"), No Carrier Pipe, Open Cut	LF	200	\$252.00	\$50,400.00	\$186.80	\$37,360.00	\$200.00	\$40,000.00	\$245.00	\$49,000.00	\$500.00	\$100,000.00
12	24" dia. Steel Casing (t=0.250"), No Carrier Pipe, Open Cut	LF	20	\$308.00	\$6,160.00	\$317.23	\$6,344.60	\$225.00	\$4,500.00	\$274.00	\$5,480.00	\$600.00	\$12,000.00
13	2" Gate Valve	EA	1	\$1,374.00	\$1,374.00	\$1,776.02	\$1,776.02	\$3,500.00	\$3,500.00	\$1,885.00	\$1,885.00	\$2,000.00	\$2,000.00
14	6" Gate Valve	EA	6	\$2,545.00	\$15,270.00	\$2,410.88	\$14,465.28	\$6,500.00	\$39,000.00	\$2,481.00	\$14,886.00	\$3,500.00	\$21,000.00
15	8" Gate Valve	EA	9	\$3,825.00	\$34,425.00	\$3,507.60	\$31,568.40	\$8,500.00	\$76,500.00	\$3,978.00	\$35,802.00	\$3,800.00	\$34,200.00
16	12" Gate Valve	EA	2	\$6,320.00	\$12,640.00	\$6,570.24	\$13,140.48	\$12,500.00	\$25,000.00	\$5,858.00	\$11,716.00	\$8,000.00	\$16,000.00
17	2" Blow-Off Assembly w/ Gate Valve	EA	2	\$2,250.00	\$4,500.00	\$3,239.25	\$6,478.50	\$32,500.00	\$65,000.00	\$3,181.00	\$6,362.00	\$4,500.00	\$9,000.00
18	6" x 6" Tapping Sleeve and Valve	EA	1	\$10,600.00	\$10,600.00	\$7,086.70	\$7,086.70	\$10,500.00	\$10,500.00	\$8,843.00	\$8,843.00	\$10,000.00	\$10,000.00
19	Fire Hydrant Assembly	EA	17	\$7,600.00	\$129,200.00	\$10,118.46	\$172,013.82	\$8,500.00	\$144,500.00	\$6,167.00	\$104,839.00	\$10,000.00	\$170,000.00
20	Free Bore for 2" Water Main	LF	140	\$20.00	\$2,800.00	\$76.37	\$10,691.80	\$50.00	\$7,000.00	\$130.00	\$18,200.00	\$100.00	\$14,000.00
21	Free Bore for 6" Water Main	LF	200	\$60.00	\$12,000.00	\$198.57	\$39,714.00	\$85.00	\$17,000.00	\$150.00	\$30,000.00	\$300.00	\$60,000.00
22	Free Bore for 8" Water Main	LF	240	\$75.00	\$18,000.00	\$213.84	\$51,321.60	\$115.00	\$27,600.00	\$180.00	\$43,200.00	\$500.00	\$120,000.00
23	Gravel Road and Driveway Repair	SY	270	\$22.50	\$6,075.00	\$51.58	\$13,926.60	\$50.00	\$13,500.00	\$75.00	\$20,250.00	\$50.00	\$13,500.00
24	Concrete Driveway Repair	SY	250	\$1.00	\$250.00	\$99.28	\$24,820.00	\$115.00	\$28,750.00	\$125.00	\$31,250.00	\$270.00	\$67,500.00
25	Asphalt Driveway Repair	SY	50	\$1.00	\$50.00	\$88.90	\$4,445.00	\$85.00	\$4,250.00	\$280.00	\$14,000.00	\$270.00	\$13,500.00
26	Asphalt Road Repair (Non-NCDOT Road)	SY	80	\$100.00	\$8,000.00	\$88.90	\$7,112.00	\$135.00	\$10,800.00	\$350.00	\$28,000.00	\$100.00	\$8,000.00
27	Asphalt Road Repair (NCDOT Road)	SY	50	\$75.00	\$3,750.00	\$393.31	\$19,665.50	\$140.00	\$7,000.00	\$380.00	\$19,000.00	\$100.00	\$5,000.00
28	Asphalt Milling (Depth of 2")	SY	160	\$25.00	\$4,000.00	\$78.20	\$12,512.00	\$75.00	\$12,000.00	\$50.00	\$8,000.00	\$50.00	\$8,000.00
29	Asphalt Overlay (Depth of 2")	SY	160	\$25.00	\$4,000.00	\$65.98	\$10,556.80	\$65.00	\$10,400.00	\$85.00	\$13,600.00	\$25.00	\$4,000.00
30	Service Connection	EA	21	\$850.00	\$17,850.00	\$1,171.18	\$24,594.78	\$1,250.00	\$26,250.00	\$1,975.00	\$41,475.00	\$1,500.00	\$31,500.00
31	¾" Copper Service (Bored)	LF	430	\$39.00	\$16,770.00	\$54.33	\$23,361.90	\$75.00	\$32,250.00	\$50.00	\$21,500.00	\$85.00	\$36,550.00
32	¾" Copper Service (Open Cut)	LF	110	\$34.00	\$3,740.00	\$67.39	\$7,412.90	\$95.00	\$10,450.00	\$40.00	\$4,400.00	\$85.00	\$9,350.00
33	Meter Box & Setting Equipment for ¾" Water Meter	EA	21	\$900.00	\$18,900.00	\$1,040.13	\$21,842.73	\$1,250.00	\$26,250.00	\$848.00	\$17,808.00	\$500.00	\$10,500.00
34	Erosion Control	LS	1	\$33,832.00	\$33,832.00	\$70,443.28	\$70,443.28	\$30,000.00	\$30,000.00	\$52,000.00	\$52,000.00	\$85,000.00	\$85,000.00
35	Restoration, Seeding, and Mulching	AC	7	\$100.00	\$650.00	\$7,890.69	\$51,289.49	\$5,000.00	\$32,500.00	\$4,532.00	\$29,458.00	\$20,000.00	\$130,000.00
36	Traffic Control	LS	1	\$42,000.00	\$42,000.00	\$57,278.54	\$57,278.54	\$40,000.00	\$40,000.00	\$40,000.00	\$40,000.00	\$200,000.00	\$200,000.00
Subtotal Base Bid					\$1,763,836.00		\$2,098,804.82 *		\$2,207,350.00		\$2,403,504.00		\$3,364,100.00
37	Testing Allowance	LS	1	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
38	Mobilization (4% of Base Bid)	LS	1	\$70,500.00	\$70,500.00	\$82,231.12	\$82,231.12	\$88,294.00	\$88,294.00	\$96,140.16	\$96,140.16	\$130,000.00	\$130,000.00
39	Contingency Allowance (5% of Base Bid)	LS	1	\$88,191.80	\$88,191.80 *	\$104,940.24	\$104,940.24 *	\$110,367.50	\$110,367.50	\$120,175.20	\$120,175.20	\$168,205.00	\$168,205.00
Total Base Bid (Base Bid + Mobilization + Contingency Allowance)					\$1,927,527.80 *		\$2,290,976.18 *		\$2,411,011.50		\$2,624,819.36		\$3,667,305.00 *

BID TABULATION
FY22 Short Water Line Extensions Phase A
Union County
BID DATE: September 30, 2025
ARDURRA# 20230824.00.CL

Classic City Mechanical, Inc.
220 Smithonia Rd
Winterville, GA 30683
License No. 15247

Simpson Land Development, LLC
7420 Secrest Short Cuty Rd
Indian Trail, NC 28079
License No. 106957

Dawn Development Company, Inc.
1815 North Rocky River Rd
Monroe, NC 28110
License No. 50539

GS Construction, Inc.
6404 Buford Highway
Norcross, GA 30071
License No. 105806

Richard D. Suggs Construction, LLC.
4610 Paige Road
Mount Pleasant, NC 28124
License No. 25338

Item No.	Description	Unit	Quantity	Unit Price	Extended Total	Unit Price	Extended Total	Unit Price	Extended Total	Unit Price	Extended Total	Unit Price	Extended Total
ALTERNATE 1 – DEEPWOOD PLACE LOOP COMPLETION:													
40	6" dia. PVC Water Line	LF	210	\$68.00	\$14,280.00	\$56.93	\$11,955.30	\$78.00	\$16,380.00	\$66.00	\$13,860.00	\$100.00	\$21,000.00
41	6" dia. RJ DIP	LF	450	\$96.50	\$43,425.00	\$96.64	\$43,488.00	\$98.00	\$44,100.00	\$117.00	\$52,650.00	\$120.00	\$54,000.00
42	Free Bore for 6" Water Main	LF	50	\$60.00	\$3,000.00	\$198.57	\$9,928.50	\$85.00	\$4,250.00	\$150.00	\$7,500.00	\$500.00	\$25,000.00
43	Concrete Driveway Repair	SY	25	\$1.00	\$25.00	\$68.73	\$1,718.25	\$115.00	\$2,875.00	\$125.00	\$3,125.00	\$270.00	\$6,750.00
44	Asphalt Driveway Repair	SY	10	\$1.00	\$10.00	\$111.50	\$1,115.00	\$85.00	\$850.00	\$250.00	\$2,500.00	\$270.00	\$2,700.00
45	Erosion Control	LS	1	\$4,115.00	\$4,115.00	\$5,000.00	\$5,000.00	\$2,500.00	\$2,500.00	\$49,000.00	\$49,000.00	\$35,000.00	\$35,000.00
46	Restoration, Seeding, and Mulching	AC	0.4	\$100.00	\$40.00	\$2,300.00	\$920.00 *	\$1,500.00	\$600.00	\$4,532.00	\$1,812.80	\$20,000.00	\$8,000.00
47	Traffic Control	LS	1	\$3,500.00	\$3,500.00	\$3,600.00	\$3,600.00	\$3,500.00	\$3,500.00	\$36,000.00	\$36,000.00	\$35,000.00	\$35,000.00
Subtotal Alternate 1					\$68,395.00		\$77,725.05 *		\$75,055.00		\$166,447.80		\$187,450.00
48	Testing Allowance	LS	1	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
49	Mobilization (4% of Base Bid)	LS	1	\$2,700.00	\$2,700.00	\$3,164.20	\$3,164.20	\$3,002.20	\$3,002.20	\$6,657.91	\$6,657.91	\$7,000.00	\$7,000.00
50	Contingency Allowance (5% of Base Bid)	LS	1	\$3,419.75	\$3,419.75 *	\$3,886.25	\$3,886.25 *	\$3,752.75	\$3,752.75	\$8,322.39	\$8,322.39	\$9,372.50	\$9,372.50
Total Alternate 1 (Base Bid + Mobilization + Contingency Allowance)					\$79,514.75 *		\$99,295.50 *		\$86,809.95		\$186,428.10		\$208,822.50
TOTAL BID (BASE BID + ALTERNATE 1)					\$2,007,042.55 *		\$2,390,271.68 *		\$2,497,821.45 *		\$2,811,247.46 *		\$3,876,127.50 *

* Math Error Corrected
I hereby certify that the above is a true and correct
(to the best of my knowledge) tabulation of bids received on September 30, 2025.


James T. Lyon, PE
ARDURRA



**RESOLUTION OF THE UNION COUNTY BOARD OF COMMISSIONERS PROVIDING NOTICE OF
FY2022 SHORT WATER LINE EXTENSION PROGRAM PHASE A
PROJECT CONSTRUCTION**

WHEREAS, pursuant to G.S § 153A-457, a county shall notify property owners and adjacent property owners prior to commencement of any construction project by the county; and

WHEREAS, G.S. § 153A-457 provides that notice of a county construction project is deemed sufficient if notice of the construction project is given in any open meeting of the county prior to the commencement of the construction project; and

WHEREAS, the Union County Board of Commissioners desires to give notice of construction of the FY2022 Short Water Line Extension Program Phase A project prior to commencement of project construction as required by G.S. § 153A-457.

NOW, THEREFORE, BE IT RESOLVED BY THE Union County Board of Commissioners that:

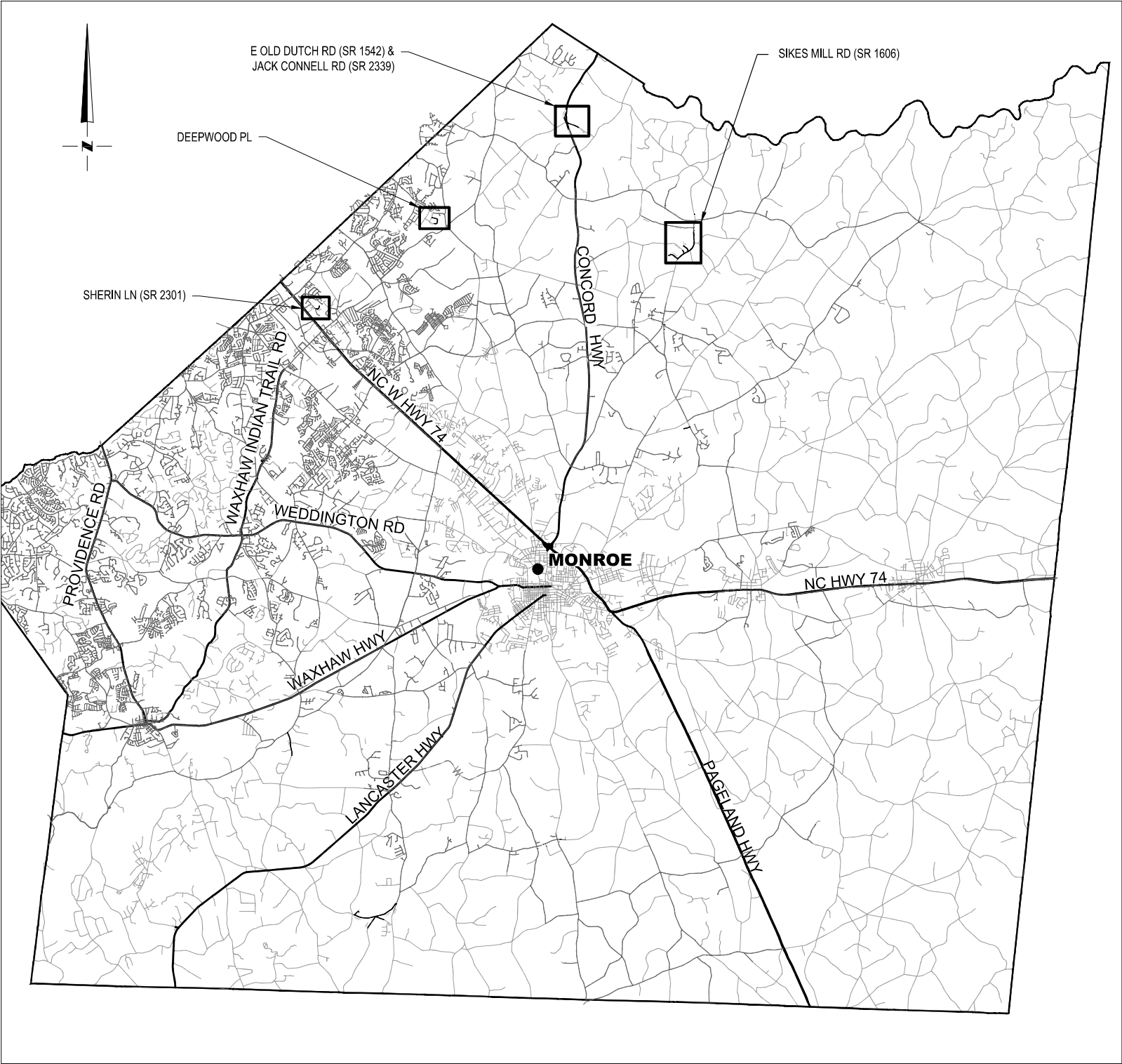
1. Union County may commence construction of the FY2022 Short Water Line Extension Program Phase A project on property as shown on the attached map after the award date of the construction contract for the project.
2. This resolution and notice is adopted in accordance with the construction notice requirements of G.S. § 153A-457.

Adopted this the 20th day of October, 2025.

Attest:

Lynn West
Clerk to the Board

Melissa Merrell
Chair, Union County Board of Commissioners



VICINITY MAP
NOT TO SCALE



Union County, NC

Staff Report

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

File #: 25-627

Agenda Date: 10/20/2025

TITLE:

Step 4 Economic Development Incentive Grant - Project Seven

INFORMATION CONTACT:

Ron Mahle, Economic Development, Director, 980-476-5279

ACTION REQUESTED:

Confirm the Board's action on July 14, 2025 (Agenda Item 25-425), involving the award of a Step 4 Economic Development Incentive Grant to Confidential Company (Project Seven) in an amount not-to-exceed \$4,860,000 over a seven-year period was an award of such incentive grant to ATI Specialty Materials, LLC.

PRIOR BOARD ACTIONS:

July 14, 2025, Regular Meeting, Agenda Item #25-424 - Public Hearing;
July 14, 2025, Regular Meeting, Agenda Item #25-425- Union County Board of Commissioners award of Step 4 Economic Development Incentive Grant to Confidential Company - Project Seven

BACKGROUND:

At its July 14, 2025, regular meeting, the Union County Board of Commissioners awarded a Step 4 Economic Development Incentive Grant to Confidential Company - Project Seven. The grant is in an amount not-to-exceed \$4,860,000 paid over a 7-year period beginning in FY2028. The name of the company is ATI Specialty Materials, LLC.

FINANCIAL IMPACT:

\$4,860,000 paid over a 7-year period beginning in FY2028.



Union County, NC

Staff Report

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

File #: 25-633

Agenda Date: 10/20/2025

TITLE:

Grant Application - Meals on Wheels America 2025-26 Waitlist Grant

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Meals on Wheels America, in partnership with Food Lion Feeds, has established a funding opportunity to help address growing waitlists for home-delivered meals across the country. These funds are intended to support local programs by providing general operations and infrastructure investments that will expand capacity and reduce wait times.

Union County has been identified as a recipient of these funds, which have been set aside for our Senior Nutrition Program. To access the funding, the County must complete an application form and accept the associated terms and conditions. The funding is \$77,000 and will primarily be used to purchase a vehicle for the Senior Nutrition Program. This vehicle will be used to deliver meals to homebound seniors and staff will use it when completing the required annual in-home visits for all clients, as mandated by North Carolina Department of Health and Human Services - Division of Aging. The additional vehicle capacity will help strengthen program operations and ensure that more seniors in Union County receive timely, reliable nutrition and support services.

Any funds remaining after the vehicle purchase are unrestricted and may be used to support other program needs, such as shelf-stable meals, computer equipment for staff, or craft and activity supplies for congregate meal site participants.

FINANCIAL IMPACT:

The grant award is \$77,000 with no required match.



Union County, NC

Staff Report

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

File #: 25-643

Agenda Date: 10/20/2025

TITLE:

Grant Application - Transportation FY2026 Rural Operating Assistance Program, FY2027 Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program and FY2027 FTA 5303 Transit Planning Grant

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to submit the associated grant applications and make necessary assurances and certifications associated with the grant applications as substantially consistent with this agenda item, which includes the authorization to execute documents, or delegate electronic execution of documents when use of the federal award management system is required, related to award of the grants and budget funds as appropriate.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Human Services Agency Transportation Department seeks approval to submit applications for three grant programs to support the continued provision and planning of public transportation services for eligible residents, particularly seniors, individuals with disabilities, and residents in rural areas. The grants include:

1. Rural Operating Assistance Program (ROAP) - FY26

ROAP is a State-funded, formula-based program administered by the NC Department of Transportation - Integrated Mobility Division (NCDOT-IMD). Union County expects to receive \$278,783 in FY26 ROAP funding to support operating costs only (no administrative or capital expenses) for eligible trips in the following categories:

- Elderly & Disabled Transportation Assistance Program (EDTAP) - \$125,890
- Employment Transportation Assistance Program (EMPL) - \$46,526
- Rural General Public (RGP) - \$106,367

Funds may cover up to 100% of the fully allocated trip cost with no local match required. While EDTAP funds must remain in their designated category, EMPL and RGP funds may be transferred to any program. The period of performance for these funds is July 1, 2025 - June 30, 2026, regardless of the date on which ROAP funds are disbursed to the County.

Eligibility:

- EDTAP: Participants must be either age 60+ or have a physical or mental impairments that substantially limits one or more major life activities, per NC G.S. Article 2B, 136-44.27.
- EMPL: Recipients must meet one of the following criteria: (1) DSS client who transitioned off Work First or Temporary Assistance for Needy Families (TANF) in the last 12 months; (2) Workforce Development Program participant; (3) Any resident who needs transportation to work, employment training or other related destinations whose work schedule and destination can be accommodated by the local transit system; (4) A child who requires transport to daycare in conjunction with an eligible parent's trip to work.
- RGP: Recipients must reside in a non-urbanized area of the County and need transport for any reason (E.g. medical appointment, educational opportunity, employment, personal business). Additionally, RGP recipients (1) must not qualify under a Human Service Agency to receive transportation or (2) their supporting Human Service Agency must have expended all transportation funding and no longer be able to fund trips.

County governments are the only eligible applicants for ROAP funds, and the County Financial Officer is the DOT-mandated person responsible for overseeing the funding.

2. Enhanced Mobility of Seniors and Individuals with Disabilities - Section 5310 Grant - FY27

The Section 5310 program (49 U.S.C. 5310) provides formula funding to states to assist private nonprofit groups in meeting 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 Division 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. Transportation staff have the capability to manage this grant and have been receiving and managing this 5310 funding since January 2016. FY27 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 over 200 seniors aged 65 and older and/or individuals with disabilities currently being served by our system under this funding.

The FY27 grant application will include:

Operations Funding (Demand Response Service):

- 50% Federal / 50% Local match
- Union County will use its Home and Community Care Block Grant (HCCBG) funds to meet the local match requirement.

Capital Funding:

- 80% Federal / 20% Local match
- Request includes purchase of one (1) 22' Light Transit Vehicle (LTV) with lift and related equipment.

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.

3. Transit Planning Program - Section 5303 Grant - FY27

Federal Transit Administration (FTA) Section 5303 federal transportation funding authorizations are allocated each year by the North Carolina Department of Transportation (NCDOT). 5303 funds are managed locally by the Charlotte Regional Transportation Planning Organization (CRTPO), the federally designated Metropolitan Planning Organization (MPO) for the Charlotte Urbanized Area (UZA). 5303 funding helps UZAs plan for the development, improvement, and effective management of their transportation systems, focusing on planning and administrative activities.

Union County Transportation requests approval to apply for \$174,411 of FY2027 5303 funds, funding is 80% Federal, 10% State, and 10% local match. Funds cover a one (1)-year period of performance from July 1, 2026, to June 30, 2027.

The Human Service Agency Transportation Department plans to use the funding associated with this grant to complete multiple tasks, including:

- Data and Planning Support - Ridership analysis, socio-economic analysis, route analysis.
- Public Participation - Rider Surveys.
- Statewide & Extra Regional Planning - Interagency coordination, state and regional coordination.
- Management, Operations & Program Support Administration - grant development, attending regional and state events.

FINANCIAL IMPACT:

1. Rural Operating Assistance Program (ROAP) - FY2026

- Total Funding: \$278,783
- Local Match Required: None
- This funding is budgeted accordingly for FY2026

2. Section 5310 Grant - FY2027

- Operating Request: \$288,000 (two-year period: July 1, 2027 - June 30, 2029)
 - Federal Share (50%): \$144,000
 - Local Match (50%): \$144,000
- Capital Request: \$147,878
 - Federal Share (80%): \$118,301
 - Local Match (20%): \$29,577
- Total Local Match Required for 5310 Grant: \$173,577

3. Section 5303 Planning Grant - FY2027

- Total Grant Request: \$174,411
 - Federal Share (80%): \$139,529
 - State Share (10%): \$17,441
 - Local Share (10%): \$17,441

- Projected revenue and local share expenditures will be included in the proposed FY2027 budget.

FY26 Rural Operating Assistance Program (ROAP) Application

Name of Entity (County)	Union County
County Manager Name	Brian W. Matthews
County Manager's Email	Brian.matthews@unioncountync.gov
County CFO Name	Beverly L. Liles
CFO's Email	Beverly.liles@unioncountync.gov
Person Completing this Application (Applicant)	Theresa Torres
Applicant's Job Title	Director
Applicant's Email Address	Theresa.torres@unioncountync.gov
Applicant's Phone Number	704-283-3598
Community Transportation System Name	Union County Transportation
Transit Contact Name	Theresa Torres
Transit Contact's Email	Theresa.torres@unioncountync.gov

Application Completed by: Theresa Torres Date: 10.20.25
 Signature

I certify that the content of this application is complete and accurately describes the County's administration of the ROAP Program, and the use of the ROAP funds in accordance with applicable state guidelines. I certify and understand that if the monthly and final monthly milestone reports, and any other status reports required by the Integrated Mobility Division (IMD) are not submitted on or before the due dates, the next scheduled disbursement will be held until all reports are submitted.

I further certify that ROAP funds will only be used for program purposes to provide trips and will not be used for administrative or operational expenses. If it is determined that ROAP funds have been misused, repayment of funds must be made.

Transit Director: Theresa Torres Date: 10.20.25
 Signature

County Manager: _____ Date: _____
 Signature

County Finance Officer: _____ Date: _____
 Signature

Application Instructions

County officials should read the Program Administration Guide for Rural Operating Assistance Program (ROAP) which contains guidance on the administration of the ROAP Program and information about the preparation of grant applications.

- The application must be completed by an official of the county or his/her designee.
- **Answer choices** are in the (parenthesis) before each gray rectangle. Click on the **gray rectangle** and type each answer. If necessary, the text will automatically wrap to the next row.
- Please answer every question. Leave no blanks.
- If the county wishes to explain their response to any questions or provide more information, the county may include additional pages with this application form. All the pages of the application and any pages added by the applicant should be scanned into the same file.
- If there are questions regarding this application, contact the NCDOT-IMD Regional Grant Specialist assigned to the area served by the transit system.

FY26 ROAP Program Schedule

Application Deadline: October 24, 2025

Anticipated Funds Disbursement: Week of November 17, 2025**

***** Applications not uploaded into Smartsheet by October 24th will delay disbursement of funds until the application is submitted and reviewed.***

- Counties with unspent FY25 funds will retain the funds and the FY26 disbursement will be adjusted accordingly.
- Counties with 5% or less in unspent funds are eligible for a second disbursement of any unspent funds from FY25. The ROAP formula will be used to determine the amount of funds each eligible county will receive.
- Once IMD ROAP reconciliation begins in mid-August, any outstanding reports will be considered unspent funds
- Monthly reports are due via SmartSheet 30 days following the reporting period (unless it falls on a weekend day i.e., July reporting period, report due August 30th)

ROAP Reporting Period	ROAP Report Deadline
July 1 - 31, 2025	August 29, 2025
August 1 - 31, 2025	September 30, 2025
September 1 - 30, 2025	October 30, 2025
October 1 - 31, 2025	November 28, 2025
November 1 - 30, 2025	December 30, 2025
December 1 - 31, 2025	January 30, 2026
January 1 - 31, 2026	February 27, 2026
February 1 - 28, 2026	March 30, 2026
March 1 - 31, 2026	April 30, 2026
April 1 - 30, 2026	May 29, 2026
May 1 - 31, 2026	June 30
June 1 – 30, 2026	July 30, 2026

Management of ROAP Funds

County governments or regional public transportation authorities created pursuant to Article 25 or Article 26 of Chapter 160A of the General Statutes (upon written agreement with municipalities or counties served) are the only eligible applicants for ROAP funds. As a recipient of ROAP funds, the county must implement administrative processes that will ensure the following:

- ROAP funds are expended on needs identified through a public involvement and/or planning process.
- **ROAP funds are expended only on eligible activities as described in Appendix A of the ROAP Guidance.**
- **Supporting documentation of expenditures (software printouts, legible receipts, etc.) is required by all applicants.**
- Transportation service recipients must meet eligibility requirements, and their eligibility is documented.
- Trips funded with ROAP funding are monitored and evaluated throughout the period of performance.
- ROAP funds received and expended are included in the local annual audit.

Counties have the flexibility to determine how the funding will be used to meet the needs of the citizens and how to suballocate the funding to meet the transportation needs, but the guidelines for each program used must be followed and trips accounted for by program used.

ROAP Public Hearing is Not a State Requirement Please Provide These Documents, Only If Required Locally	
1. Public Hearing Notices languages (N/A, English Only, English & Spanish)	N/A
2. Public Hearing Affidavit (N/A, Attached)	N/A
3. Was the Public Hearing Notice published within 7-14 days of the hearing? (N/A, Yes, No)	N/A
4. Public Hearing Record (N/A, Attached)	N/A
5. Public Hearing Minutes (N/A, Attached)	N/A
6. Title VI Survey (N/A, Offered but None Completed, Attached)	N/A

Grant Administration
1. What Public Transportation Plans are available for your area? (Community Coordinated Plan (CCP), Locally Coordinated Plan (LCP), Statewide Locally Coordinated Plan (SLCP), Other Plans – (List all that apply)) Coordinated Public Transit-Human Services Transportation Plan, SLCP, CTP
2. Did the County/Authority ask the Community Transportation Advisory Board (TAB) to recommend how the ROAP funds should be suballocated? (Yes/No) No 2a. If no, how were recommendations made and by whom (Describe)? We have always used ROAP funds to cover the trip costs. ROAP funds are not suballocated to anyone else in the County. 2b. How many individuals assisted in the determination? (List number here) 0
3. Were outreach efforts conducted to inform agencies about the availability and eligibility of ROAP funds and to discuss transportation needs PRIOR TO the county deciding how to suballocate the ROAP funds? (N/A, Yes- Outreach Conducted, No Outreach) N/A

Financial Management

<p>1. Does the county pass through any ROAP funds to governmental or non-profit agencies or organizations? (If the County/Authority passes through any ROAP funds, they should have a written agreement between them which addresses the proper use and accountability of these funds.) (List all that applies: N/A, EDTAP, EMPL, RGP) N/A</p>
<p>2. Do any of the organizations or departments receiving ROAP funds plan to use private transit contractors to provide the ROAP funded trips? (Their procurement practices will need to meet all federal and state requirements for procurement of professional services.) (List all that applies: No - Private Contractor Used, Yes for EDTAP, EMPL, and/or RGP) No Private Contractors</p>
<p>3. Are ROAP funds deposited in an interest-bearing account? (Ensure interest earned on the funds will be retained by the transportation program and must be used for transportation related expenses) (Yes, No) Yes</p>
<p>4. Do you have local financial support that will prevent discontinuation of services? (Trips may be limited but cannot stop altogether due to lack of ROAP funds.) (Yes, No) Yes</p> <p>4a. If No, how will you continue to offer trips after ROAP funds are exhausted? (Please describe.) N/A</p>

Monitoring and Oversight Responsibilities
<p>1. Subrecipients of ROAP funds are required to provide sufficiently detailed progress reports and statistical data about trips provided and rider eligibility with ROAP funds. Are you receiving these? (The County must be prepared to provide documentation that an eligible citizen was provided an eligible service or trip on the billed date, by whatever conveyance, at a specific cost.) (Yes, No) Yes</p>
<p>2. Will the ROAP allocation be used as matching funds for any of the following programs? (EDTAP funds may only be used for Enhanced Mobility of Senior & Individuals with Disabilities and must be properly tracked.)</p> <p>5310 – Enhanced Mobility of Senior & Individuals with Disabilities Program-EDTAP (Operating only) (Yes, No) No</p> <p>5310 – Enhanced Mobility of Senior & Individuals with Disabilities Program-EDTAP (Capital Cost of Contracting only) (Yes, No) No</p> <p>5311 Operating only - Rural Area Formula Program (Yes, No) No</p> <p>Rural State Operating Program (Yes, No) No</p> <p>5311 Capital Cost of Contracting Program (Yes, No) No</p>
<p>3. Will fares be charged for a ROAP funded trip? (List all that applies: No-Fares not charged, Yes - EDTAP, EMPL, and/or RGP No-Fares not charged)</p>
<p>4. Describe the eligibility criteria and documents used in this County to determine who will be provided ROAP-funded trips. (Please describe i.e. Driver's license check, professional assessment, etc.) professional assessment and drivers license</p>

CERTIFIED STATEMENT
FY2026
RURAL OPERATING ASSISTANCE PROGRAM
County of Union

WHEREAS, the state-funded, formula-based Rural Operating Assistance Program (ROAP) administered by the North Carolina Department of Transportation, Integrated Mobility Division provides funding for the operating cost of passenger trips for counties within the state;

WHEREAS, the county uses the most recent transportation plans (i.e., CCP, CTIP, LCP) available and other public involvement strategies to learn about the transportation needs of agencies and individuals in the county before determining the sub-allocation of these ROAP funds;

WHEREAS, the county government or regional public transportation authorities created pursuant to Article 25 or Article 26 of Chapter 160A of the General Statutes (upon written agreement with the municipalities or counties served) are the only eligible recipients of Rural Operating Assistance Program funds which are allocated to the counties based on a formula as described in the Program Guidelines included in the ROAP State Management Plan. NCDOT will disburse the ROAP funds only to counties and eligible transportation authorities and not to any sub-recipients selected by the county;

WHEREAS, the county finance officer will be considered the county official accountable for the administration of the Rural Operating Assistance Program in the county, unless otherwise designated by the Board of County Commissioners;

WHEREAS, the passenger trips provided with ROAP funds must be accessible to individuals with disabilities and be provided without discrimination on the basis of national origin, creed, age, race, or gender (FTA C 4702.1B, FTA C 4704.1A, Americans with Disabilities Act 1990); and

WHEREAS, the period of performance for these funds will be July 1, 2025 to June 30, 2026 regardless of the date on which ROAP funds are disbursed to the county.

NOW, THEREFORE, by signing below, the duly authorized representatives of the County of Union North Carolina certify that the following statements are true and accurate:

- The county employed a documented methodology for sub-allocating ROAP funds that involved the participation of eligible agencies and citizens. Outreach efforts to include the participation of the elderly and individuals with disabilities, persons with limited English proficiency, minorities and low-income persons in the county's sub-allocation decision have been documented.
- The county will advise any sub-recipients about the source of the ROAP funds, specific program requirements and restrictions, eligible program expenses and reporting requirements. The county will be responsible for invoicing any sub-recipients for unexpended ROAP funds as needed.
- The county will monitor ROAP funded services routinely to verify that ROAP funds are being spent on allowable activities and that the eligibility of service recipients is being properly documented. The county will maintain records of trips for at least five years that prove that an eligible citizen was provided an eligible transportation service on the billed date, by whatever conveyance at the specified cost.
- The county will be responsible for monitoring the safety, quality, and cost of ROAP funded services and assures that any procurements by subrecipients for contracted services will follow state and federal guidelines.
- The county will conduct regular evaluations of ROAP funded passenger trips provided throughout the period of performance.
- The county will only use the ROAP funds to provide trips when other funding sources are not available for the same purpose or the other funding sources for the same purpose have been completely exhausted.

- The county will notify the Regional Grant Specialist assigned to the county if any ROAP funded services are discontinued before the end of the period of performance due to the lack of funding. No additional ROAP funds will be available.
- The county will provide an accounting of trips and expenditures in monthly reports to NCDOT – Integrated Mobility Division or its designee. **Back-up documentation is required to support the monthly reports, failure to provide documentation will affect future disbursements. The June report will be considered the annual report.**
- Any interest earned on the ROAP funds will be expended for eligible program uses as specified in the ROAP application. The County will include ROAP funds received and expended in its annual independent audit on the schedule of federal and state financial assistance. Funds passed through to other agencies will be identified as such.
- The county is applying for the following amount of FY2026 Rural Operating Assistance Program funds: *The total amount of allocated funds are identified in the Total Disbursement (columns L-O) on the allocation table. The amount of requested funds cannot exceed the amount of allocated (disbursed) funds listed in the application table. Funds are allowed to be transferred to ROAP programs as needed, according to transfer criteria. Transfers must be recorded in the monthly ROAP report in the month transferred.

State-Funded Rural Operating Assistance Program	Allocated*(Disbursed)	Requested
Elderly and Disabled Transportation Assistance Program (EDTAP)	\$125,890	<u>\$125,890</u>
Employment Transportation Assistance Program (EMPL)	\$46,526	<u>\$46,526</u>
Rural General Public Program (RGP)	\$106,367	<u>\$106,367</u>
TOTAL	<u>\$278,783</u>	<u>\$278,783</u>

WITNESS my hand and county seal, this 20 day of October , 2025 .

Signature of County Manager/Administrator

Brian W. Matthews
Printed Name of County Manager/Administrator

Signature of County Finance Officer

Beverly L. Liles
Printed Name of County Finance Officer

State of North Carolina County of Union

County Seal Here

FY 2024

**CALL FOR PROJECTS &
GRANT APPLICATION**

CHARLOTTE-MECKLENBURG
URBANIZED AREA'S

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

RFP 269-2026-1928

AUGUST 22, 2025

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 Urban Area (Char-Meck UA). 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.

SECTION 1: APPLICANT INFORMATION

Field	Response
Legal Name (Agency)	Union County
Doing Business As (DBA) (if any)	
Address	1407 Airport Road
City, State, ZIP	Monroe, NC 28110
Federal Tax ID Number	56-6000345

Unique Entity Identifier (UEI)	LHMKBD4AGRJ5
Parent Agency UEI (if different)	N/A
Project Manager Name & Title	Theresa Torres
Telephone	704-283-3598
Email	Theresa.torres@unioncountync.gov
Project Service Area (County/Counties)	Union County
Organization Type (check one)	<input type="checkbox"/> Local Government Authority <input type="checkbox"/> Private Non-Profit Organization <input checked="" type="checkbox"/> Public Transportation Operator <input type="checkbox"/> Private Operator of Public Transportation

SECTION 2: ORGANIZATIONAL OVERVIEW

- Mission Statement:** *Union County Transportation's (UCT) mission is to serve the residents of Union County and internal County business partners by providing reliable and efficient transportation services in a safe and cost-effective manner.*

2. Services Currently Provided to Seniors/Individuals with Disabilities:

UCT provides accessible transportation for seniors and individuals with disabilities, enabling them to maintain their independence, access essential services, pursue educational and employment opportunities, and fully engage in community life.

3. Experience Managing Similar Projects:

a. Project 1: Section 5307 – Operating and Capital Funding

In FY25, UCT provided over 32,133 passenger trips using Section 5307 funds. This support included both operating assistance and capital investments, helping to maintain and enhance service delivery.

b. Project 2: HCCBG (Home and Community Care Block Grant)

Through HCCBG funding, UCT completed 6,569 trips for adults aged 60 and older, supporting access to essential services and promoting independent living for seniors.

c. Project 3: ROAP (Rural Operating Assistance Program)

ROAP funding supported 14,219 trips for rural residents, including individuals traveling to work, to and from their homes, and those with disabilities or aged 60 and older. These trips are critical in addressing mobility needs in underserved rural areas.

4. Staff and Resources Available for this Project:

The UCT staff has overseen the 5310 grant since UCT first received funds in 2016. We have worked closely with the employees at CATS to ensure UCT meets all regulations. Tana Cromwell – Admin Professional is responsible for determining eligibility and record maintenance for all grant-funded passengers. Tana has managed this area of the grant since 2017. Beth Young, an Analytical Specialist, is responsible for utilizing our scheduling software's billing module to invoice agencies, verifying all driver manifests, and assisting with other functions of the grant. Beth has been managing 5310 funding since 2022.

SECTION 3: PROJECT NARRATIVE

Project Title	Section 5310 – Enhancing On-Demand Transportation for Seniors and Individuals with Disabilities in Union County
Project Type	[] Traditional 5310 [X] Other 5310

Total Funding Requested	\$435,878 <i>Total Cost/ Federal \$262,301/ Local \$173,577</i>
Scope of Services	<p><i>This project will enhance transportation access for seniors and individuals with disabilities in Union County, using Section 5310 funds to support both vehicle acquisition and operating assistance. The goal is to reduce mobility barriers and improve quality of life by offering safe, reliable, and accessible transportation to essential destinations.</i></p> <p><i>Target Population</i></p> <p><i>Transportation services will be provided to:</i></p> <ul style="list-style-type: none"> <i>• Individuals aged 65 and older</i> <i>• Individuals of any age with a qualifying disability</i> <p><i>Services Provided</i></p> <p><i>The program will provide:</i></p> <ul style="list-style-type: none"> <i>• Curb-to-curb and door-to-door transportation</i> <i>• scheduled trips</i> <i>• Assistance with boarding and deboarding vehicles, if needed</i> <p><i>Trip purposes may include:</i></p> <ul style="list-style-type: none"> <i>• Medical appointments</i> <i>• Grocery shopping and pharmacy visits</i> <i>• Access to senior centers and adult day programs</i> <i>• Social services and government agency appointments</i> <i>• Community and recreational activities</i> <p><i>Vehicle Purchase</i></p> <ul style="list-style-type: none"> <i>• The project includes the purchase of one ADA-compliant, wheelchair-accessible van to expand current service capacity.</i> <p><i>All vehicles will meet federal and state safety standards and be operated and maintained in compliance with FTA and NCDOT guidelines.</i></p>

	<p><i>Expected Outcomes</i></p> <ul style="list-style-type: none"> • <i>Increased access to essential services for seniors and people with disabilities</i> • <i>Improved health and well-being through reduced missed appointments</i> • <i>Greater community engagement and reduced isolation</i> • <i>Efficient use of coordinated transportation resources across agencies</i>
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Brief Project Description:

UCT is requesting Section 5310 funding to support both operating and capital expenses that improve transportation access for seniors and individuals with disabilities. Operational funds will be used to provide on-demand, curb-to-curb transportation for passengers aged 65 and older and for those with disabilities. These trips enable riders to access essential services, such as healthcare, grocery stores, social services, and other daily necessities, helping them maintain their independence and quality of life.

Capital funding will be used to purchase and install wheelchair safety arms in vehicles, improving rider safety and ensuring ADA compliance. A vehicle that is ADA-equipped, camera equipment, and installation of a radio. This investment will enhance the accessibility and reliability of our services for passengers who require mobility aids.

This project aligns with the goals of the 5310 programs by expanding access, increasing safety, and reducing transportation barriers for populations with the greatest need.

1. Target Population:

Estimated number of seniors and/or individuals with disabilities served: 1,190

Total population with unmet transit needs in service area: 1,929, with no Vehicles

2. Demographics and Geography:

All areas of the County have and will continue to benefit from this project. Attached is a map showing the locations to be served by 5310 grant funds, including non-medical facilities to which we transport seniors age 65 and older or individuals with disabilities. We've also included additional maps illustrating workers without vehicles (noting that many seniors continue working past age 65), residents aged 65+ with disabilities, and

the total number of disabled persons in the County. The 50-to-64 age group is growing fastest—up 50.7%, which suggests our 65+ population will increase significantly in the coming years.

3. **Coordination and Partnerships:**

UCT partners with Anson County for our trips going into Charlotte. Several days of the week, we will meet Anson at a relay location. Our passengers will transfer to the Anson van, and Anson will take them to Charlotte for their appointment. This allows UCT vehicles to remain in the County, helping to assist more people.

4. **Timeline and Milestones:**

Please list key milestones and their anticipated dates.

Milestone Description	Anticipated Completion Date	Responsible Party
Capital Items	No more than 1 year after the contract is signed	Theresa Torres
Operational Funding	No more than 1 year after the contract is signed	Beth Young
Capital – Vehicle	No more than 1 year after the contract is signed, unless there is an issue ordering vehicles. This is hard to determine, as we are still awaiting a 2024 vehicle order.	Theresa Torres

5. **Sustainability Plan:**

At present, there is no local guarantee that this program will continue if 5310 funding ends. However, we proactively work to transition as many 5310-funded passengers as possible to alternative funding sources already in use in our system that serve the same populations. If the reduction or loss of 5310 funds occurs, we would prioritize and limit other funding programs to those trip types whose eligibility criteria align with 5310 services, ensuring that seniors and individuals with disabilities continue to access their essential appointments.

6. **Alignment with CPT-HSTP:**

According to our region's Coordinated Plan, if seniors are no longer able to drive, two-thirds will be left relying solely on on-demand or community transportation services. As our population ages, demand will only increase, placing greater pressure on

community transit providers. The same is true for individuals with disabilities—especially those who live outside of existing ADA paratransit or deviated fixed-route service areas—where transportation options are currently much more limited. Union County Transportation is the only public transit agency in the County equipped to serve both of these vulnerable groups. We are committed to working closely with county partners to expand capacity and ensure reliable access to transportation for our growing senior and disabled populations.

7. Scalability:

If we receive only partial funding, the scope of what we can achieve will adjust accordingly. In particular:

Capital purchases depend on sufficient funding:

If we do not secure enough capital funding, we may not be able to purchase a vehicle.

Prioritization of core functions:

In case funding is limited, we will prioritize essential services first. For example, we may continue transportation for seniors and individuals with disabilities but defer non-urgent services or expansions until full funding is available.

SECTION 4: PERFORMANCE & EVALUATION

Indicator	How Will It Be Measured	Frequency
One-way trips provided	Dispatch/Trip logs	Quarterly
Denials or missed trips	Operations data	Quarterly
Customer satisfaction	Survey or feedback forms	Annually
Equipment or vehicle usage	Mileage logs or GPS data	Quarterly

Briefly describe how you will collect and track the above data.

Our system monitors key performance metrics, including the number of one-way trips provided, as well as any denials or missed trips, and tracks vehicle usage. When customers call

to schedule rides, we randomly select some to complete a satisfaction survey. The survey results are documented and available for sharing

Will your system allow for system-generated reporting (e.g., Excel, Trapeze, etc.)?

All reports that are generated by our scheduling software can be downloaded and saved to Excel.

SECTION 5: BUDGET SUMMARY

Capital/Operating/Mobility Management Budget Table (Example Template)

Use the example format below to break down your proposed budget by line item. You may add rows as needed to reflect your project costs. This is only a template.

Expense Category	Total Cost	Federal Share	Local Match	Match Type (Cash/In-Kind)	Notes/Description
Vehicle Purchase	\$131,361	\$105,088	\$26,273	General Fund	Capital Purchase
Tablet & Arm	\$1,000	\$800	\$200	General Fund	Needed for Vehicle
Safety Arms	\$5,738	\$4,590	\$1,148	General Fund	Needed for Vehicle
Vehicle Wraps	\$3,815	\$3,052	\$763	General Fund	Needed for Vehicle
Camera Purchase and Install	\$2,964	\$2,371	\$593	General Fund	Needed for Vehicle
Vehicle Radio	\$3000	\$2,400	\$600	General Fund	Needed for Vehicle
Trip Cost	\$288,000	\$144,000	\$144,000	HCCBG	Operational Cost
TOTAL	\$435,878	\$262,301	\$173,577		

Provide a detailed justification for each category (Limit: 500 words per category):

- Describe the costs included and why they are necessary.
- Explain how local match will be provided, including sources.
- If match is in-kind, attach a valuation method or documentation.
- Note any other grants or funding that complement this budget.

Vehicle and Equipment required for vehicles (Safety Arm, Vehicle Wrap, Cameras, Radio) - An additional public vehicle would significantly enhance our capacity to meet growing community needs.

Improved Access to Essential Services: *Many older adults and individuals with disabilities rely on public transit for non-emergency medical appointments, grocery shopping, pharmacy visits, and social engagement. An additional vehicle ensures more timely and consistent access to these critical destinations.*

Greater Independence and Quality of Life: *Reliable, accessible transportation empowers older adults and people with disabilities to live independently, remain active in their communities, and maintain social connections, all of which are vital for physical and mental well-being.*

This investment directly supports the health, dignity, and independence of some of our most vulnerable residents.

Trip Cost - *This aligns with the goals of the FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Program, which aims to improve mobility and reduce transportation barriers for older adults and people with disabilities.*

A portion of the grant funding will be used to support transportation services and travel costs, enabling these individuals to access critical services, programs, and community activities. This may include:

- *Accessible transportation to medical appointments, social service agencies, or senior centers*
- *Trips to grocery stores, pharmacies, and essential errands*
- *Transportation to community events or recreational programs that reduce isolation*

Many of our target participants live on fixed incomes and lack access to safe, reliable, or accessible transportation options. By providing funded travel support, we are ensuring independent living and improving overall quality of life.

All services will comply with the requirements of the Section 5310 program, including ADA accessibility standards, coordination with local transportation providers, and alignment with the CPT-HSTP.

The local match will be drawn from HCCBG for operating and the general fund for capital and will be included in the adopted budget for fiscal year 2027.

SECTION 6: REQUIRED ATTACHMENTS CHECKLIST

Please confirm the following are included:

1. **Title VI Plan** – Your agency’s current nondiscrimination policy.
2. **Organizational Chart** – Include all departments and the location of the proposed project within the structure.
3. **Key Personnel Resumes** – Include resumes for individuals directly managing the proposed project.
4. **Lobbying Certification** – Certification that no federal funds will be used for lobbying purposes.
5. **Debarment Certification** – Certification that the bidder, contractor, or subcontractor, as appropriate, certifies to the best of its knowledge and belief that neither it nor any of its officers, directors, or managers who will be working under the Contract, are certified to do so.
6. **Conflict of Interest Statement** – Statement disclosing any potential or actual conflicts.
7. **Disclosure Form for Lobbying** – Required only if lobbying activities are occurring.
8. **Local Share Certification Form** – Signed form documenting the sources and amounts of non-federal match.
9. **Project Milestone Table** – A completed table outlining key milestones with dates and responsible parties.
10. **Vehicle Inventory or Capital Asset List (if applicable)** – Include if applying for capital funds, or if your agency owns 5310-funded assets.

SECTION 7: SYNOPSIS (EXECUTIVE SUMMARY)

Complete this last and limit to one page.

1. What is the title of your project?

Section 5310 – Enhancing On-Demand Transportation for Seniors and Individuals with Disabilities in Union County

2. How much money are you requesting and how will it be used?

\$435,878 Total Cost/ Federal \$262,301/ Local \$173,577 for capital and operational expenses.

3. What is the main deliverable?

The primary deliverable is the provision of coordinated and accessible transportation solutions, including vehicles and operational support, specifically designed to serve seniors and individuals with disabilities. These services aim to improve mobility, reduce isolation, and increase access to healthcare, employment, and other community resources.

4. How will the project be sustained?

UCT will sustain future 5310 projects by ensuring that all awarded funds are utilized effectively and within designated timeframes. To date, UCT has successfully expended all previously awarded 5310 grant funds, demonstrating strong fiscal management and commitment to program compliance.

5. Is the project scalable?

Yes, our project is scalable. Service levels can be adjusted based on the amount of funding received. With full funding, we can fully implement our service plan, expand trip availability, and accommodate new client registrations without delay. If awarded a reduced amount, we can scale the project accordingly by prioritizing the most critical trips and adjusting scheduling. Our operational structure, flexible routing, and experienced staff allow us to expand service levels efficiently based on available resources.

6. How would the project change if less funding is awarded?

While receiving less than the full requested amount would still be helpful, it would create a funding shortfall. The amount requested is essential to provide critical transportation services for seniors and individuals with disabilities. As our fleet expands to meet increasing demand, we will be able to complete more trips and serve more

passengers. However, if awarded less funding, we may need to reduce the number of trips provided under this grant. This could result in delays for new client registrations and potentially reinstate a wait list, something we have previously eliminated with previous 5310 support.

7. Include your top 3–5 milestones or tasks with dates.

Grant Award Notification – Spring 2027: Receive Official award notice and begin internal planning.

Vehicle Procurement – Summer 2027: Submit purchase order and coordinate with approved vendors for vehicle acquisition, following all FTA and state procurement guidelines.

Vehicle delivery and Inspection – Winter 2027: Receive and inspect vehicles to ensure compliance with ADA and safety standards.

Submit completed applications electronically by **October 31, 2025, at 2:00 PM** to:
Beverly Hovis – Department of Contracting & Procurement
Beverly.Hovis@charlottenc.gov

Early submittals are encouraged. Incomplete applications will not be reviewed.

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 – [Brian Matthews County Manager/Authorized Official](#) brian.matthews@unioncountync.gov 500 N. Main St. 9th Floor Monroe, NC 28110
2. Administrative Contact (person responsible for grant administration) [Theresa Torres, Director](#) theresa.torres@unioncountync.gov 1407 Airport Road, Monroe, NC 28110 704-283-3598 (P) 704-283-3551 (F)
3. Operations Contact (person responsible for operational issues) [Brandon Earp, Human Service Supervisor](#) brandon.earp@unioncountync.gov 1407 Airport Road, Monroe, NC 28110 704-292-2597

4. Procurement Contact (person responsible for procuring assets and preparing bid packages) [Vicky Watts, Senior Procurement Specialist vicky.watts@unioncountync.gov](mailto:vicky.watts@unioncountync.gov) 500 N. M 500 N. Main St. Suite 709 Monroe, NC 28110 704-2283-3601
5. Financial Contact (person responsible for billing, accounting, closeouts, reimbursement requests) [Laura Gardner Human Service Supervisor Fiscal Compliance laura.gardner@unioncountync.gov](mailto:laura.gardner@unioncountync.gov) 1407 Airport Road, Monroe, NC 28110 704-292-2566
6. Audits Contact (responsible for annual audits) [Beth Young, Analytical Specialist, Theresa Torres, Director, Laura Gardner Human Service Supervisor Fiscal Compliance](mailto:beth.young@unioncountync.gov) 1407 Airport Road, Monroe, NC 28110
7. Legal Counsel [Carolyn Mayor, Senior Staff Attorney carolyn.mayer@unioncountync.gov](mailto:carolyn.mayer@unioncountync.gov) 500 N. Main Street, Monroe, NC 28110 704-283-3772
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.
[Brian Matthews County Manager/Authorized Official brian.matthews@unioncountync.gov](mailto:brian.matthews@unioncountync.gov) 500 N. Main St. 9th Floor Monroe, NC 28110 704-292-2597
9. DBE Representative
[Laura Gardner Human Service Supervisor Fiscal Compliance laura.gardner@unioncountync.gov](mailto:laura.gardner@unioncountync.gov) 1407 Airport Road, Monroe, NC 28110 704-292-2566
10. ADA Representative [Matt Smith Safety Officer matthew.smith@unioncountync.gov](mailto:matthew.smith@unioncountync.gov) 1407 Airport Road Monroe, NC 28110 704-292-2511
11. Title VI Representative [Theresa Torres, Director thesa.torres@unioncountync.gov](mailto:theresa.torres@unioncountync.gov) 1407 Airport Road, Monroe, NC 28110 704-283-3598 (P) 704-283-3551 (F)

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	<i>Union County Procurement</i>	<i>Vicky Watts, Senior Procurement Specialist</i>
Contract w/ Service Provider	<i>N/A</i>	<i>N/A</i>
Civil Rights Records (EEO, Title VI, ADA)	<i>Union County Transportation</i>	<i>Theresa Torres Director</i>
Financial Records	<i>Union County Transportation</i>	<i>Laura Gardner, HS Supervisor, Fiscal and Compliance</i>
Procurement and Bid Documents (Including RFPs)	<i>Union County Procurement</i>	<i>Vicky Watts, Senior Procurement Specialist</i>
Certificates and Assurances	<i>Union County Transportation</i>	<i>Theresa Torres, Director</i>
Others (List)	<i>N/A</i>	<i>N/A</i>
Capital Projects		
Vehicle Records	<i>Union County Fleet</i>	<i>Amanda Joyner</i>
Non-Vehicle Records		
Transportation Service Projects		
Driver Manifests	<i>Union County Transportation</i>	<i>Beth Young, Analytical Specialist</i>

Daily Pre-Trip Forms	<i>Union County Transportation</i>	<i>Beth Young, Analytical Specialist</i>
Maintenance Records	<i>Union County Fleet</i>	<i>Amanda Joyner, Office Manager</i>
Drug and Alcohol Records	<i>Union County Transportation</i>	<i>Matthew Smith, Safety Officer</i>
Ridership Records	<i>Union County Transportation</i>	<i>Tana Cromwell, Admin Professional II</i>

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.

Bid/RFP/State Contract	Name/Type of Asset/Service	Timeframe	Estimated Cost/Budget
<i>54-SG-05062022</i>	<i>Palmetto Bus/22' LTV</i>	<i>Unknown</i>	<i>\$131,361</i>
<i>Under \$10,000</i>	<i>Grant Services/Wheelchair Safety Arm</i>	<i>Within the grant POP</i>	<i>\$5,738</i>
<i>Under \$10,000</i>	<i>Industrial Sign Graphics/Vehicle Warp</i>	<i>Within the grant POP</i>	<i>\$3,815</i>
<i>Under \$10,000</i>	<i>Seon & The Solution Store /Camera purchase and Install</i>	<i>Within the grant POP</i>	<i>\$2,964</i>
<i>Under \$10,000</i>	<i>Motorola/ Van Radio</i>	<i>Within the grant POP</i>	<i>\$3,000</i>
<i>Under \$10,000</i>	<i>Tablet & Arm</i>	<i>Within the grant Pop</i>	<i>\$1,000</i>

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 (*Union County Transportation*) during the period July 1, 2024 through June 30, 2025.

10/20/25

Signature of Authorized Official

Date

Brian W. Matthews

Type Name and Title of Authorized Official

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, 2024 through June 30, 2025.

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

(Attach an additional page if required.)

Signature of Authorized Official

Date

Name and Title of Authorized Official

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)

Union County

(Legal Name of Applicant)

Local matching funds are required for application submittals for Fiscal Year 2024. Please list all 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)	\$ <u>147,878</u>	\$ <u>29,577</u> (20% of net)	1. <u>General Fund</u> 2. _____ 3. _____
Operating	\$ <u>288,000</u>	\$ <u>144,000</u> (50% of net)	1. <u>HCCBG</u> 2. _____ 3. _____
TOTAL	\$ <u>435,878</u>	\$ <u>173,577</u>	

I, the undersigned representing *Union County*, do hereby certify to the City of Charlotte, that the required local funds will be available as of **July 1, 2026**.

Signature of Authorized Official

Brian W. Matthews
Name and Title of Authorized Official

10/20/25
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: County Manager Telephone No. (704) 292-2597

Firm or Corporate Name: Union County

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

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 <i>(if individual, last name, first name, MI):</i>	b. Individuals Performing Services <i>(including address if different from No. 10a)</i> <i>(last name, first name, MI):</i> <i>(attach Continuation Sheet(s) SF-LLL-A, if necessary)</i>	
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: <i>(attach Continuation Sheet(s) SF-LLL-A, if necessary)</i>	
15. Continuation Sheet(s) SF-LLL-A attached: <input type="checkbox"/> Yes <input type="checkbox"/> No		

<p>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.</p>	<p>Signature:</p> <p>Print Name: <u>Brian W. Matthews</u></p> <p>Title: <u>County Manager</u></p> <p>Telephone No.: <u>(704) 292-2597</u></p> <p>Date: <u>10/20/25</u></p>
<p>Federal Use Only:</p>	<p>Authorized for Local Reproduction Standard Form-LLL</p>

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. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

The bidder, contractor, or subcontractor, as appropriate, certifies to the best of its knowledge and belief that neither it nor any of its officers, directors, or managers who will be working under the Contract, or persons or entities holding a greater than (ten percent) 10% equity interest in it (collectively "Principals"):

1. Are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal or state department or agency in the United States;
2. Have within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state anti-trust or procurement statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are presently indicted for or otherwise criminally or civilly charged by a government entity, (federal, state or local) with commission of any of the offenses enumerated in paragraph 2 of this certification; and
4. Have within a three-year period preceding this application/proposal had one or more public transactions (federal, state or local) terminated for cause or default.

I understand that a false statement on this certification may be grounds for rejection of this proposal or termination of the award or in some instances, criminal prosecution.

☐ **I hereby certify as stated above:**

(Print Name)

Signature

County Manager _____

10/20/25 _____

Title

Date

☐ **I am unable to certify to one or more the above statements. Attached is my explanation. [Check box if applicable]**

(Print Name)

Signature

I. 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: County Manager Date of Signing: 10/20/25
Firm or Corporate Name: Union County
Address: 500 N. Main Street, Monroe, NC 28112

Telephone Number: (704)-292-
2597

J. CHECKLIST FOR SUBMITTING PROPOSAL

Step 1 – Read the document fully

Step 2 Proposal Copies

- ☐ An electronic Application to be delivered, to Department of Contracting & Procurement,
Attention: Beverly Hovis at beverly.hovis@charlottenc.gov.

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 FY24 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 #: 25-630

Agenda Date: 10/20/2025

TITLE:

Resolution - Surplus Vehicle Sale

INFORMATION CONTACT:

Corey Brooks, Procurement & Contract Management, Interim Director, 704-283-3683

ACTION REQUESTED:

Adopt Resolution Authorizing Surplus Property Sale by Internet Auction which 1) declares the property itemized on Attachment A as "Surplus" to the needs of Union County, 2) authorizes sale at electronic auction of the surplus property described in Attachment A as per the terms and conditions as specified in the online auction service provider contract, and 3) authorizes the Procurement Director or their designee to execute any and all documents necessary to transfer title to said property on behalf of Union County.

BACKGROUND:

North Carolina General Statutes allow the disposition of personal property by local governments through a variety of means including private negotiations and sale; advertisement for sealed bids; negotiated offer, advertisement, and upset bid; public auction; or exchange. In 2001, the legislature amended the Statues to provide for disposition of property through electronic auction.

The sale will begin October 28, 2025, at 9:00 AM and end November 11, 2025, with incremental closings as indicated on Attachment A. A summary of the vehicle information is listed below. Additional vehicle information can be found on Attachment A.

Union County Water

- (2) 2014 FORD F350 SUPERCAB

UCSO

- (1) 2013 DODGE CHARGER
- (1) 2014 DODGE CHARGER
- (1) 2014 FORD EXPLORER
- (1) 2014 CHEVROLET TAHOE
- (1) 2016 CHEVROLET TAHOE
- (1) 2017 CHEVROLET CAPRICE
- (1) 2017 FORD EXPLORER
- (2) 2018 FORD POLICE INTERCEPTOR

Building Code Enforcement

- (1) 2015 FORD F150

Transportation

- (1) 2018 DODGE CARAVAN

The vehicles are to be picked up at 610 Patton Avenue, Monroe, NC with the following terms of sale:

1. Sale to the highest bidder with all sales final.
2. All items sold “as is” with no warranty, expressed or implied, which extends beyond the description of the item.
3. Purchasers must remove vehicles(s) within ten (10) business days from the time and date of issuance of the Buyer’s Certificate.
4. Payment must be made online through the online auction website. Payment in full is due not later than five (5) business days from the time and date of the Buyers Certificate. Payment will not be accepted onsite.

FINANCIAL IMPACT:

Estimated revenue is \$50,000. The revenue will be returned to the fund from which the asset came.

RESOLUTION AUTHORIZING SURPLUS PROPERTY SALE BY INTERNET AUCTION

WHEREAS, G.S. 160-270(c) allows Union County to sell personal property at electronic auction upon adoption of a resolution authorizing the Procurement & Contract Management Director or her designee to dispose of the property at electronic auction; and

WHEREAS, the Procurement Manager has developed a list of these items as shown on Attachment “A” for review by the Board of Commissioners for disposal by electronic auction;

NOW, THEREFORE, BE IT HEREBY RESOLVED by the Union County Board of Commissioners that the items of personal property included on Attachment “A” and incorporated herein by reference, be declared surplus and that the Procurement Manager or her designee be authorized to sell at electronic auction, beginning October 28, 2025, at 9:00 a.m. and ending November 11, 2025, with incremental closings as indicated on Attachment “A”, the surplus property described on Attachment “A”, as per the terms and conditions as specified in the County’s existing contract with the on-line auction Service Provider to the highest bidders.

BE IT FURTHER RESOLVED that the Procurement Director or her designee is authorized to execute any and all documents necessary to transfer said property on behalf of Union County.

BE IT FURTHER RESOLVED that the terms of sale applicable at the aforementioned auction of the items listed on Attachment “A” shall be as follows:

1. Sale to the highest bidder with all sales final.
2. All items sold “as is” and “where is” with no warranty, expressed or implied, which extends beyond the description of the items.
3. Purchasers must remove vehicle(s) within ten business days from the time and date of issuance of the Buyer’s Certificate. The vehicles are to be picked up at 610 Patton Avenue, Monroe, North Carolina. Purchasers shall bear sole risk of loss for all items remaining on the premises ten (10) calendars days from the time and date of issuance of the Buyer’s Certificate.
4. Payment must be made online through the on-line auction Website. Payment in full is due not later than five (5) calendar days from the time and date of the Buyer’s Certificate. Payment cannot be accepted onsite.

BE IT FURTHER RESOLVED that payment of advertising and miscellaneous expenses be paid from the proceeds of the sale.

Adopted this 20th day of October 2025

ATTEST:

Lynn G. West, Clerk to the Board

Melissa Merrell, Chair

Attachment A

Tag Number	Description	Serial/Parcel	Mileage	Department	Auction Start	Auction End
06-14	Ford F350 Super Cab	1FD8X3DT7EEA27240	180,094	UC Water	10/28/25 9:00 AM	11/11/25 9:00 AM
07-14	Ford F350 Super Cab	1FD8X3DTEEA27239	140,593	UC Water	10/28/25 9:00 AM	11/11/25 9:10 AM
11-13	Dodge Charger	2C3CDXAT70H627707	119,348	UCSO	10/28/25 9:00 AM	11/11/25 9:20 AM
12-14	Dodge Charger	2C3DXAT3EH145866	122,204	UCSO	10/28/25 9:00 AM	11/11/25 9:30 AM
32-14	Ford Explorer	1FM5K8AB1EGA75859	119,249	UCSO	10/28/25 9:00 AM	11/11/25 9:40 AM
34-14	Chevrolet Tahoe	1GNLC2E04ER179825	162,963	UCSO	10/28/25 9:00 AM	11/11/25 9:50 AM
33-15	Ford F150	1FTEX1C80FFC54371	198,599	Building Code Enforcement	10/28/25 9:00 AM	11/11/25 10:00 AM
44-16	Chevrolet Tahoe	1GNSKDEC1GR252849	149,641	UCSO	10/28/25 9:00 AM	11/11/25 10:10 AM
51-17	Chevrolet Caprice	6G3NS5U24HL302137	98,545	UCSO	10/28/25 9:00 AM	11/11/25 10:20 AM
66-17	Ford Explorer	1FM5K8AT5HGD92236	109,346	UCSO	10/28/25 9:00 AM	11/11/25 10:30 AM
47-18	Dodge Caravan	2C7WDGBGOJR176414	164,478	Transportation	10/28/25 9:00 AM	11/11/25 10:40 AM
11-18	Ford Police Interceptor	1FMSK8AR5JGA32281	356,612	UCSO	10/28/25 9:00 AM	11/11/25 10:50 AM
30-18	Ford Police Interceptor	1FM5K8AT85GA36952	148,887	UCSO	10/28/25 9:00 AM	11/11/25 11:00 AM



Union County, NC

Staff Report

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

File #: 25-635

Agenda Date: 10/20/2025

TITLE:

Grant Application - Firehouse Subs Public Safety Foundation

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Fire Marshal's Office is seeking authorization to apply for and, if awarded, accept a grant from the Firehouse Subs Public Safety Foundation in the amount of \$15,000 (no local match). The grant program provides funding to public safety organizations across the nation to enhance emergency response capabilities, improve community safety, and support lifesaving operations through specialized equipment.

The proposed project will fund the purchase of digital cameras and accessories to improve incident documentation, post-disaster damage assessments, and fire investigation capabilities. High-resolution imagery is a critical component of accurate scene evaluation, training, and reporting. These tools will allow the Fire Marshal's Office to collect precise photographic evidence during investigations, emergency incidents, and natural disaster events.

FINANCIAL IMPACT:

Union County anticipates requesting approximately \$15,000 in funding with no local match.



Union County, NC

Staff Report

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

File #: 25-622

Agenda Date: 10/20/2025

TITLE:

Purchase - Replacement/Expansion Vehicles

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:

Fleet requests the approval to purchase fourteen (14) replacement and/or expansion vehicles. Seven (7) Social Services Administration vehicles have met their use in life and were approved for replacement in the FY26 budget. One (1) expansion vehicle was approved for Economic Development in the FY26 budget. Four (4) UC Water trucks have met their use in life and were approved for replacement in the FY26 budget. One (1) expansion truck was approved for Facilities Management, and one (1) expansion truck was approved for UC Water in the FY26 Budget. A summary of the replacement/expansion vehicles is below:

Replacements

- (1) 2026 Chevrolet Equinox - Replaces 05-16, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 02-16, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 48-14, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 28-13, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 04-16, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 03-16, Social Services Admin, \$28,795.50
- (1) 2026 Chevrolet Equinox - Replaces 47-14, Social Services Admin, \$28,795.50
- (1) 2026 Ford F250 Service Body - Replaces 17-17, UC Water, \$53,257.70
- (1) 2026 Ford F250 Service Body - Replaces 34-16, UC Water, \$53,257.70
- (1) 2026 Ford F350 Service Body - Replaces 03-15, UC Water, \$70,283.10
- (1) 2026 Ford F350 Service Body - Replaces 35-13, UC Water, \$70,283.10

Expansion

- (1) 2026 Chevrolet Tahoe 4WD - Expansion, Economic Development, \$55,463.25

- (1) 2026 Ford F350 Service Body - Expansion, Facilities Mgt., \$64,041.00
- (1) 2026 Ford F550 Service Body - Expansion, UC Water, \$87,654.30

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 6 Equinox and 1 Tahoe will be made using North Carolina Statewide Term Contract 2510A as quoted by Capital Chevrolet. The purchase of the 6 Ford trucks will be made using North Carolina State Term Contract 2510A as quoted by Piedmont Trucks.

FINANCIAL IMPACT:

The anticipated cost for the vehicles is \$655,808.65 and is budgeted accordingly for FY2026. Of this, \$257,031.75 will cover the purchase of 6 Equinox and 1 Tahoe and \$398,776.90 will cover the purchase of 6 Ford Trucks.

4/22/25
Reg 215-2020
8015

Unit #1

05-10 Replacement
1013606-09/11/11 110

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

August 1 2025

NC State Contract 2510A

2026 Chevrolet Equinox AWD 1PT26 2LT

MSRP \$ 28,795.50
Less 6% Discount

Colors available: White, Mosaic Black, Cacti Green, Sterling Gray, Lakeshore Blue
TOTAL PRICE

\$ 28,795.50

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587

1/22/25
Reg. MS. 2020
5015

Line #2

02-16 Replacement
10/30/21 55,400-15,410

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

August 1 2025

NC State Contract 2510A

2026 Chevrolet Equinox AWD 1PT26 2LT

MSRP \$ 28,795.50
Less 6% Discount

Colors available: White, Mosalc Black, Cacti Green, Sterling Gray, Lakeshore Blue
TOTAL PRICE

\$ 28,795.50

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587

1/22/25
Reg. 215-2070
9415

Line 3

up-14 Replacement
10/20/2016-10/10/10

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

August 1 2025

NC State Contract 2510A

2026 Chevrolet Equinox AWD 1PT26 2LT

MSRP \$ 28,795.50
Less 6% Discount

Colors available: White, Mosal Black, Cacti Green, Sterling Gray, Lakeshore Blue
TOTAL PRICE

\$ 28,795.50

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587

1/22/25
Reg 215 2026
8415

Line 411

28-13 Replacement
10/5/2021-10/5/2021 12:210

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

August 1 2025

NC State Contract 2510A

2026 Chevrolet Equinox AWD 1PT26 2LT

MSRP \$ 28,795.50
Less 6% Discount

Colors available: White, Mosaic Black, Cacti Green, Sterling Gray, Lakeshore Blue
TOTAL PRICE

\$ 28,795.50

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587

1/22/25
Reg. MS. 7026
3015

Line # 5

Cap to Replacement
10/30/2024 10/30/2024

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

August 1 2025

NC State Contract 2510A

2026 Chevrolet Equinox AWD 1PT26 2LT

MSRP \$ 28,795.50
Less 6% Discount

Colors available: White, Mosal Black, Cacti Green, Sterling Gray, Lakeshore Blue
TOTAL PRICE

\$ 28,795.50

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587

1/22/25
Reg 95 2025
9015

03-16 Replacement
15132000 5/3/2025 2103

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

August 1 2025

NC State Contract 2510A

2026 Chevrolet Equinox AWD 1PT26 2LT

MSRP \$ 28,795.50
Less 6% Discount

Colors available: White, Mosaic Black, Cacti Green, Sterling Gray, Lakeshore Blue
TOTAL PRICE

\$ 28,795.50

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587

1/22/25
Reg. 205 2022
8015

Line 11-7

LT7-14 Replacement
123,600-1,540-1710

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

August 1 2025

NC State Contract 2510A

2026 Chevrolet Equinox AWD 1PT26 2LT

\$ 28,795.50
MSRP Less 6% Discount

Colors available: White, Mosaic Black, Cacti Green, Sterling Gray, Lakeshore Blue
TOTAL PRICE

\$ 28,795.50

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587

9/22/25
809 215-8026
8415

Unit # 21

Expansion

Capital Chevrolet Inc.

Government Sales Division

From
Phone/Fax
E-Mail

Rod Mitchell Government Account Manager
Office 919-573-8530
rmitchell@capitalchevroletnc.com

September 18 2025

NC State Contract 2510A

2026 Chevrolet Tahoe 1FL/LS SSV 4WD CK10706

\$ 54,504.45
MSRP Less 6% Discount

VK3 Front licence plate bracket
B30 Carpet flooring come with B58 carpet floor mats
PQA Driver safety package, comes with DRZ, UBC

N/C
\$ 195.00 \$ 183.30
\$ 825.00 \$ 775.50

Colors available: White, Black, Sterling Gray, Dark Ash, Lake Shore Blue
TOTAL PRICE

\$ 55,463.25

Remit to:
rmitchell@capitalchevroletnc.com
Capital Chevrolet of Wake Forest
9820 Capital Blvd
Wake Forest, NC 27587



PIEDMONT TRUCKS



2024-2029 STATE OF NORTH CAROLINA TERM CONTRACT #2510A-Fleet Vehicles-All Types
OPTIONS LIST CATEGORY E-MEDIUM SUPER DUTY TRUCKS- F250 Pickup/Chassis
BID NO. DPC-704600681-BJ

STANDARD ITEMS

10000 GVWR, COLOR: WHITE, 6.8L V-8, GAS ENGINE, TorqShift-G 10-Speed Automatic w/SelectShift®, 3.73 STANDARD REAR AXLE, POWER EQUIPMENT GROUP-POWER WINDOWS/LOCKS, CRUISE CONTROL, TRAILER TOW MIRRORS, SYNC 4 BLUETOOTH, TILT STEERING WHEEL, AIR CONDITIONING, SPARE TIRE-Pickup version only, ALL SEASON TIRES, HEAVY DUTY ALTERNATOR, 40/20/40 VINYL (GRAY) SEATS, TRAILER TOW PACKAGE-2.5" TRAILER HITCH WITH 7&4 WAY TRAILER PLUG, REAR VIEW CAMERA (Pickup version only, deleted with pickup box delete), (2) KEY FOBS

PICKUP / CAB CHASSIS CONFIGURATION	BODY CODE	BASE BID PRICE
2026 F250 Regular cab 4x2 pickup-long bed 142wb	F2A-600A	\$39,942.00
STATE PRICING 6% Discount		
OPTION	MSRP	

CREDITS

Pickup Box Delete - REQUIRES 56"CA/LONG BED CONFIGURATION-Deletes tie down hooks, tailgate, rear bumper, rearview camera, spare wheel, tire, carrier and jack and 7/4 pin connector. Includes Rear View Camera & Prep Kit	66D	-\$625.00	-\$456.00
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TIRES / WHEELS

Spare Tire, Wheel, Carrier & Jack -optional with chassis (66D)	512	\$295.00	\$277.30
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OTHER OPTIONS

Trailer Brake Controller (incl. Smart Trailer Tow Connector)	52B	\$300.00	\$282.00
Platform Running Boards-REGULAR CAB ONLY	18B	\$320.00	\$300.80
Heavy-Service Front Suspension Package - Includes heavy-service front springs	67H	\$125.00	\$117.50
Heavy-Service Package for Pickup Box Delete - Includes Rear Stabilizer Bar, required with 67H	63R	\$125.00	\$117.50
250 Amp Alternator-required with 43C & 66S	67E	\$185.00	\$173.90
110V/400W Outlet - Includes 1 in-dash mounted outlet	43C	\$225.00	\$211.50
Upfitter Switches (6) - Located in overhead console	66S	\$250.00	\$235.00
Exterior Backup Alarm (Pre-Installed)	76C	\$230.00	\$216.20

UPFIT OPTIONS

Knapheide 696J 8' standard service body, single rear wheel, fits 56"CA, trailer plug, Cab guard, LED compartment lights	8SBCG	\$10,961.70	\$10,304.00
Spray liner for cargo area & compartment tops & rear bumper	SLCB	\$1,634.04	\$1,536.00

Total for pickup/chassis & options quote#UCF2AG8SB-J2-93025	Date: 9.30.2025	\$53,257.70
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Union County
Mandy Joyner
704.283.3893cell amanda.joyner@unioncountync.gov



PIEDMONT TRUCKS



2024-2029 STATE OF NORTH CAROLINA TERM CONTRACT #2510A-Fleet Vehicles-All Types

OPTIONS LIST CATEGORY E-MEDIUM SUPER DUTY TRUCKS- F250 Pickup/Chassis

BID NO. DPC-704600681-BJ

STANDARD ITEMS

10000 GVWR, COLOR: WHITE, 6.8L V-8, GAS ENGINE, TorqShift-G 10-Speed Automatic w/SelectShift®, 3.73 STANDARD REAR AXLE, POWER EQUIPMENT GROUP-POWER WINDOWS/LOCKS, CRUISE CONTROL, TRAILER TOW MIRRORS, SYNC 4 BLUETOOTH, TILT STEERING WHEEL, AIR CONDITIONING, SPARE TIRE-Pickup version only, ALL SEASON TIRES, HEAVY DUTY ALTERNATOR, 40/20/40 VINYL (GRAY) SEATS, TRAILER TOW PACKAGE-2.5" TRAILER HITCH WITH 7&4 WAY TRAILER PLUG, REAR VIEW CAMERA (Pickup version only, deleted with pickup box delete), (2) KEY FOBS

PICKUP / CAB CHASSIS CONFIGURATION	BODY CODE	BASE BID PRICE
2026 F250 Regular cab 4x2 pickup-long bed 142wb	F2A-600A	\$39,942.00
STATE PRICING 6% Discount		
OPTION	MSRP	

CREDITS

Pickup Box Delete - REQUIRES 56"CA/LONG BED CONFIGURATION-Deletes tie down hooks, tailgate, rear bumper, rearview camera, spare wheel, tire, carrier and jack and 7/4 pin connector. Includes Rear View Camera & Prep Kit	66D	-\$625.00	-\$456.00
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TIRES / WHEELS

Spare Tire, Wheel, Carrier & Jack -optional with chassis (66D)	512	\$295.00	\$277.30
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OTHER OPTIONS

Trailer Brake Controller (incl. Smart Trailer Tow Connector)	52B	\$300.00	\$282.00
Platform Running Boards-REGULAR CAB ONLY	18B	\$320.00	\$300.80
Heavy-Service Front Suspension Package - Includes heavy-service front springs	67H	\$125.00	\$117.50
Heavy-Service Package for Pickup Box Delete - Includes Rear Stabilizer Bar, required with 67H	63R	\$125.00	\$117.50
250 Amp Alternator-required with 43C & 66S	67E	\$185.00	\$173.90
110V/400W Outlet - Includes 1 in-dash mounted outlet	43C	\$225.00	\$211.50
Upfitter Switches (6) - Located in overhead console	66S	\$250.00	\$235.00
Exterior Backup Alarm (Pre-Installed)	76C	\$230.00	\$216.20

UPFIT OPTIONS

Knapheide 696J 8' standard service body, single rear wheel, fits 56"CA, trailer plug, Cab guard, LED compartment lights	8SBCG	\$10,961.70	\$10,304.00
Spray liner for cargo area & compartment tops & rear bumper	SLCB	\$1,634.04	\$1,536.00

Total for pickup/chassis & options
quote#UCF2AG8SB-J1-93025

Date: 9.30.2025

\$53,257.70

Union County
Mandy Joyner
704.283.3893cell amanda.joyner@unioncountync.gov



PIEDMONT TRUCKS



2024-2029 STATE OF NORTH CAROLINA TERM CONTRACT #2510A-Fleet Vehicles-All Types

OPTIONS LIST-CATEGORY G -F350 Cab and Chassis-DRW

BID NO. DPC-704600681-BJ

STANDARD ITEMS

14,000lb GVWR, Exterior Color: Oxford White, XL Trim Package, 7.3L V8 gasoline engine, 10-speed automatic transmission, 3.73 regular rear axle, LT245 17" BSW All season tires, Power Equipment Group, Cruise Control, PTO Provision, Air conditioning, AM/FM/MP3 radio with SYNC Bluetooth, Tilt steering wheel, (2) keys, 40/20/40 Vinyl seats-Gray, Vinyl flooring

CAB CHASSIS CONFIGURATION

2026 Ford F350 Supercab 4x4 Dual rear wheel-168wb 60"CA

BODY CODE

X3H-640A

BASE BID PRICE

\$52,656.00

**STATE
PRICING 6%
Discount**

OPTION

MSRP

POWERTRAIN

Limited Slip w/4.30 Axle Ratio

X4L

\$385.00

\$361.90

WHEELS/TIRES

Tires: LT245/75R17E BSW A/T

TBM

\$165.00

\$155.10

Spare Tire, Wheel & Jack

512

\$350.00

\$329.00

OTHER OPTIONS

High Mount Stop Lamp

59H

\$100.00

\$94.00

Trailer Brake Controller (incl. Smart Trailer Tow Connector)

52B

\$300.00

\$282.00

Heavy-Service Front Suspension Package - Includes heavy-service front springs

67H

\$125.00

\$117.50

Dual 78 AH Battery

86M

\$210.00

\$197.40

410 Amp Alternator

67B

\$215.00

\$202.10

Platform Running Boards-SUPERCAB & CREW CAB ONLY

18B

\$445.00

\$418.30

Rear View Camera & Prep Kit

872

\$515.00

\$484.10

110V/400W Outlet - Includes 1 in-dash mounted outlet

43C

\$225.00

\$211.50

Exterior Backup Alarm

76C

\$230.00

\$216.20

UPFIT OPTIONS

Knapheide 6108D54 9' service body, White, Dual rear wheel, to fit 60"CA, receiver hitch, trailer plug, Cab Guard, LED compartment lights

K9SB

\$13,836.17

\$13,006.00

Spray liner for cargo area & compartment tops & rear bumper

SLCB

\$1,651.06

\$1,552.00

Total for chassis & options
quote#UCX3HG9SB-J1-93025

Date: 9.30.2025

\$70,283.10

Union County

Mandy Joyner

704.283.3893cell amanda.joyner@unioncountync.gov



PIEDMONT TRUCKS



2024-2029 STATE OF NORTH CAROLINA TERM CONTRACT #2510A-Fleet Vehicles-All Types

OPTIONS LIST-CATEGORY G -F350 Cab and Chassis-DRW

BID NO. DPC-704600681-BJ

STANDARD ITEMS

14,000lb GVWR, Exterior Color: Oxford White, XL Trim Package, 7.3L V8 gasoline engine, 10-speed automatic transmission, 3.73 regular rear axle, LT245 17" BSW All season tires, Power Equipment Group, Cruise Control, PTO Provision, Air conditioning, AM/FM/MP3 radio with SYNC Bluetooth, Tilt steering wheel, (2) keys, 40/20/40 Vinyl seats-Gray, Vinyl flooring

CAB CHASSIS CONFIGURATION

2026 Ford F350 Supercab 4x4 Dual rear wheel-168wb 60"CA

BODY CODE

X3H-640A

BASE BID PRICE

\$52,656.00

OPTION

MSRP

STATE PRICING 6% Discount

POWERTRAIN

Limited Slip w/4.30 Axle Ratio

X4L

\$385.00

\$361.90

WHEELS/TIRES

Tires: LT245/75Rx17E BSW A/T

TBM

\$165.00

\$155.10

Spare Tire, Wheel & Jack

512

\$350.00

\$329.00

OTHER OPTIONS

High Mount Stop Lamp

59H

\$100.00

\$94.00

Trailer Brake Controller (incl. Smart Trailer Tow Connector)

52B

\$300.00

\$282.00

Heavy-Service Front Suspension Package - Includes heavy-service front springs

67H

\$125.00

\$117.50

Dual 78 AH Battery

86M

\$210.00

\$197.40

410 Amp Alternator

67B

\$215.00

\$202.10

Platform Running Boards-SUPERCAB & CREW CAB ONLY

18B

\$445.00

\$418.30

Rear View Camera & Prep Kit

872

\$515.00

\$484.10

110V/400W Outlet - Includes 1 in-dash mounted outlet

43C

\$225.00

\$211.50

Exterior Backup Alarm

76C

\$230.00

\$216.20

UPFIT OPTIONS

Knapheide 6108D54 9' service body, White, Dual rear wheel, to fit 60"CA, receiver hitch, trailer plug, Cab Guard, LED compartment lights

K9SB

\$13,836.17

\$13,006.00

Spray liner for cargo area & compartment tops & rear bumper

SLCB

\$1,651.06

\$1,552.00

Total for chassis & options

quote#UCX3HG9SB-J2-93025

Date: 9.30.2025

\$70,283.10

Union County

Mandy Joyner

704.283.3893cell amanda.joyner@unioncountync.gov

Awarded Vendor: Spencer Wood, Government Sales Director, 336.688.2239 cell, srwood@piedmonttruckcenter.com

Piedmont Truck Center 412 S. Regional Rd. Greensboro NC 27409



PIEDMONT TRUCKS



2024-2029 STATE OF NORTH CAROLINA TERM CONTRACT #2510A-Fleet Vehicle-All Types
OPTIONS LIST CATEGORY E-MEDIUM SUPER DUTY TRUCK- F350 Single Rear Wheel Pickup/Chassis
BID NO. DPC-704600681-BJ

STANDARD ITEMS

10,500lb GVWR, Exterior Color: Oxford White, XL Trim Package, 6.8L V8 gasoline engine, 10-speed automatic transmission, 3.73 regular rear axle, LT245 17" BSW tires, Air conditioning, Power Equipment Group, Cruise Control, AM/FM/MP3 radio with SYNC Bluetooth, Tilt steering wheel, Spare tire/wheel (Standard with pickup, optional with chassis), (2) keys, Rear view camera (standard with pickup, optional with chassis), 40/20/40 Vinyl seats-Gray, Vinyl flooring, Receiver hitch, 7 & 4 way trailer plugs

PICKUP / CAB CHASSIS CONFIGURATION	BODY CODE	BASE BID PRICE	
2026 Ford F350 Supercab 4x4 pickup-short bed 148wb	X3B-610A	\$46,359.00	
		STATE PRICING 6% Discount	
	OPTION	MSRP	
CAB CONFIGURATION			
Long bed - 8' pickup / 56"CA for cab chassis *must choose this option to make a cab chassis*	LB	\$1,686.17	\$1,585.00
POWERTRAIN			
Electronic-Locking w/3.73 Axle Ratio	X3E	\$430.00	\$404.20
WHEELS/TIRES			
Tires: LT275/70Rx18E BSW A/T (4)	TDX	\$265.00	\$249.10
Wheels: 18" Argent Painted Steel	64F	\$455.00	\$427.70
OTHER OPTIONS			
Trailer Brake Controller (incl. Smart Trailer Tow Connector)	52B	\$300.00	\$282.00
Heavy-Service Front Suspension Package - Includes heavy-service front springs	67H	\$125.00	\$117.50
Dual 78 AH Battery	86M	\$210.00	\$197.40
410 Amp Alternator	67B	\$215.00	\$202.10
Platform Running Boards-SUPERCAB & CREW CAB ONLY	18B	\$445.00	\$418.30
110V/400W Outlet - Includes 1 in-dash mounted outlet	43C	\$225.00	\$211.50
Exterior Back up alarm	76C	\$230.00	\$216.20
Upfitter Switches (6) - Located in overhead console	66S	\$250.00	\$235.00
UPFIT OPTIONS			
Knapheide 696J 8' standard service body, single rear wheel, fits 56"CA, trailer plug, Cab guard, LED compartment lights	8SBCG	\$12,340.43	\$11,600.00
Spray liner for cargo area & compartment tops & rear bumper	SLCB	\$1,634.04	\$1,536.00

Total for pickup/chassis & options	Date: 9.30.2025	\$64,041.00
quote#UCX3BG8SB-93025		

Union County
Mandy Joyner
704.283.3893cell amanda.joyner@unioncountync.gov



PIEDMONT TRUCKS



2024-2029 STATE OF NORTH CAROLINA TERM CONTRACT #2510A-Fleet Vehicles-All Types

OPTIONS LIST - CATEGORY G - F550 Cab and Chassis

BID NO. DPC-7046006891-BJ

STANDARD ITEMS

18,000lb GVWR, Exterior Color: Oxford White, XL Trim Package, 7.3L V8 gasoline engine, 10-speed automatic transmission, 4.88 regular rear axle, Power Equipment Group, PTO Provision, Cruise Control, 225/70Rx 19.5" BSW All Purpose tires, Air conditioning, AM/FM/MP3 radio with SYNC Bluetooth, Tilt steering wheel, (2) keys, 40/20/40 Vinyl seats-Gray, Vinyl flooring

CAB CHASSIS CONFIGURATION

2026 Ford F550 Crew Cab 4x4-179wb 60"CA chassis cab

BODY CODE

W5H-660A

BASE BID PRICE

\$57,967.00

**STATE
PRICING 6%
Discount**

OPTION

MSRP

POWERTRAIN

6.7L 4V OHV Power Stroke V8 Turbo Diesel B20

99T

\$10,995.00

\$10,335.30

Limited Slip w/4.30 Axle Ratio

X4L

\$395.00

\$371.30

Payload Plus Upgrade Package 2 (19,550 lbs. GVWR)

68H

\$1,155.00

\$1,085.70

WHEELS/TIRES

225/70Rx19.5G BSW Traction - Includes 4 traction tires on the rear and 2 traction tires on the front. Not recommended for over the road applications; could incur irregular front tire wear and/or NVH

TGK

\$215.00

\$202.10

Spare Tire, Wheel & Jack

512

\$350.00

\$329.00

OTHER OPTIONS

High Mount Stop Lamp

59H

\$100.00

\$94.00

Trailer Brake Controller (incl. Smart Trailer Tow Connector)

52B

\$300.00

\$282.00

Heavy-Service Front Suspension Package

67H

\$125.00

\$117.50

High Capacity Trailer Tow Package - requires Diesel engine

535

\$580.00

\$545.20

Engine Block Heater

41H

\$250.00

\$235.00

410 Amp Alternator

67B

\$215.00

\$202.10

Platform Running Boards-SUPERCAB & CREW CAB ONLY

18B

\$445.00

\$418.30

Rear View Camera & Prep Kit

872

\$515.00

\$484.10

110V/400W Outlet - Includes 1 in-dash mounted outlet

43C

\$225.00

\$211.50

Exterior Backup Alarm

76C

\$230.00

\$216.20

UPFIT OPTIONS

Knapheide 6108D54 9' service body, White, Dual rear wheel, to fit 60"CA, receiver hitch, trailer plug, Cab Guard, LED compartment lights

K9SB

\$13,836.17

\$13,006.00

Spray liner for cargo area & compartment tops & rear bumper

SLCB

\$1,651.06

\$1,552.00

Total for chassis & options

Date: 9.30.2025

\$87,654.30

quote#UCW5HD9SB-93025

Union County

Mandy Joyner

704.283.3893cell amanda.joyner@unioncountync.gov



Union County, NC

Staff Report

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

File #: 25-640

Agenda Date: 10/20/2025

TITLE:

Contract Amendment - Additional Design Services for the South Piedmont Regional Autopsy Center

INFORMATION CONTACT:

Linda Whitaker, Facilities and Fleet Management, Assistant Director Design and Construction, 704-420-2626

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:

May 05, 2025, Regular Meeting, Agenda Item # 25-215 - Approved Design Contract with CPL Architects & Engineers, PC for Advanced Planning/Conceptual Design Phase

BACKGROUND:

This request is to approve a contract amendment with CPL to provide full building and site design and construction administration services for the South Piedmont Regional Autopsy Center project. The project includes a new building between 13,000 and 15,000 gross square feet, site work and utilities and will be located on the parcel adjacent to the Union County Sheriff's Office Campus. The cost of this amendment is \$1,669,225.00, bringing the revised total fee to \$1,885,425.00. Staff recommends approval of this contract amendment to continue design services for a full building and site design for the project.

FINANCIAL IMPACT:

The cost for this amendment is \$1,669,225.00. There are sufficient funds in capital account 40080222 South Piedmont Regional Autopsy Center project to cover this expense.



AIA® Document G802® – 2017

Amendment to the Professional Services Agreement

PROJECT: *(name and address)*

Union County South Piedmont
Regional Autopsy Center

AGREEMENT INFORMATION:

Date:
10-06-2025

AMENDMENT INFORMATION:

Amendment Number:
001
Date:
10-06-2025

OWNER: *(name and address)*

Union County, North Carolina
500 N Main St
Monroe, NC 28112

ARCHITECT: *(name and address)*

CPL Architects & Engineers, PC
3600 South Blvd, Station 4, Suite 500
Charlotte, NC 28209

The Owner and Architect amend the Agreement as follows:

Design Services Include: Civil Engineering /Structural Engineering/ Architecture / Medical Examiner Planning / Medical Examiner Equipment Design and Specification, Mechanical, Electrical, Plumbing, and Fire Protection Engineering / AV, Security, and Technology Design. Interior Design as defined in the Professional Fee Proposal - Amendment 001 - SD, DD, CD, CA" (Exhibit 001), dated October 6, 2025.

The Architect's compensation and schedule shall be adjusted as follows:

Compensation Adjustment:

The Contract Sum will be increased by this Agreement in the amount of \$1,669,225.00, per Professional Fee Proposal - Amendment 001 - SD, DD, CD, CA" (Exhibit 001), dated October 6, 2025 and CPL 2025 Standard Billing Rate Schedule (Exhibit 002).

Schedule Adjustment:

The Contract Time will be increased by 635 days, per Union County SPRAC Schedule (Exhibit 003), dated September 26, 2025.

ARCHITECT *(Signature)*

BY: Eric Leibenguth, AIA, Principal-in-Charge

(Printed name, title, and license number if required)

October 6, 2025

Date

OWNER *(Signature)*

BY: Brian Mathews, County Manager

(Printed name and title)

Date

September 29, 2025
R1: October 6, 2025

Ms. Linda Whitaker
Project Manager
Union County
1407 Airport Road
Monroe, NC 28110



RE: **PROFESSIONAL FEE PROPOSAL – AMENDMENT 001 - SD, DD, CD, CA
Union County – SPRAC (South Piedmont Regional Medical Examiner’s Office)
Monroe, NC**

Dear Ms. Whitaker:

On behalf of CPL, we are pleased to submit the following design fee proposal for Architectural, Medical Examiner Planning, and Engineering services necessary for Union County (UC) – SPRAC (South Piedmont Regional Medical Examiner’s Office) to be located at the parcels 09057011 and 09057011A.

Our previous design services contract included advanced planning and concept design only. The design team requests additional design service fees as identified as Amendment 001-line items within the Fee Schedule table. Our design services include Schematic Design through Construction Administration as described herein. We understand that our current AIA contract will be amended according to these additional services.

PROJECT UNDERSTANDING

To date we have completed all programming meetings. The general consensus is that the current programmed facility sf has been approved at 15,184 sf per the programming document dated 08/29/2025.

At this time our understanding of the project is as follows:

- Funding for the new medical examiner’s facility is through the State of North Carolina and will be designed to meet the requirements necessary to achieve National Association of Medical Examiner’s (N.A.M.E) accreditation. UC asked that design scope fee should assume that we will not be required to submit documentation through North Carolina SCO, review will be local AHJs only.
- A future Jail Facility is anticipated to be located on the West adjacent parcel to our site and will have no bearing on the site circulation or utility connections currently planned for the new SPRAC



- There is a general understanding of the required off-site D.O.T. scope based on our initial meeting. Further discussion is needed to confirm final D.O.T. requirements and what impact that may have on the design scope, project schedule, and budget. A road connection between the existing Sheriff's Office and the new SPRAC is also expected. The off-site DOT connection to 74 and the road connection between the existing Sheriff's Office and the new SPRAC will be studied individually to understand the cost and schedule impact of each.
- Approximate Total Cost of Work for Construction and Site Activities:
 - Based on an approximate square foot cost of \$1100, assumed building construction and site development cost is approximately \$ 16.4 million.

SCOPE OF SERVICES

Design Services Include: Civil Engineering / Structural Engineering / Architecture / Medical Examiner Planning / Medical Examiner Equipment Design and Specification, Mechanical, Electrical, Plumbing, and Fire Protection Engineering / AV, Security, and Technology Design. Interior Design

TASK I - SCHEMATIC DESIGN

- (4) Virtual Meetings: Review overall project progress, document development, and budget development.
- Deliverables (digital):
 - Preliminary code summary. To include a code abstract compilation of all applicable codes, regulations, ordinances that are required by governmental agencies having jurisdiction.
 - Schematic architectural site and floor plans, roof plan, building elevations and building exterior material designations
 - Schematic civil site plan to include future expansion and flexibility to accommodate future toxicology, utility requirements, site utilities, stormwater management
 - Schematic narrative including basic foundation and framing plan.
 - MEP/FP narratives. Limited drawings may also be provided to assist with preparing the cost estimate.
 - MWL Equipment Schedule and Equipment Procurement
 - Schematic Design Phase Cost Estimate

TASK II - DESIGN DEVELOPMENT

- (2) Virtual Meetings, (3) In Person: Design meetings to review overall documentation development with the primary focus on decisions around MEP systems, equipment selection/placement, security/IT/AV coordination, and finishes, as well as budget development.
- At this stage, the overall project scope is set with no anticipated major changes. The design team will proceed with further development and documentation of the civil site plan, interior and exterior building features, general finishes, structural system(s), major equipment, and MEP/FP line drawings.
- Deliverables (digital):
 - Code summary.



**PROFESSIONAL FEE PROPOSAL
AMENDMENT 001 - SD, DD, CD, CA**

Union County - SPRAC
Monroe, NC
September 29, 2025

Page 3 of 7

- Outline specifications.
- Design Development Drawing Set to Owner and CM.
- Photo-quality-colored renderings - limited to two (2) exterior views. No additional renderings are included.
- Design Development Phase Cost Estimate

TASK III – CONSTRUCTION DOCUMENTS

- Meeting 1 (Virtual): Owner review meeting with 50% Construction Documents.
- Meeting 2 (In-Person): Owner review meeting with 90% Construction Documents.
- Prepare for final design drawings and project specifications. CM is responsible for preparing front end bidding specifications with both Owner and Architect review.
- Coordinate drawing submission requirements with applicable review agencies for permitting.
- Deliverables (digital):
 - CPL will provide Construction Documentation in compliance with the North Carolina State Building Code (2024 edition) and other applicable standards.
 - Both drawings and specifications will be provided.
- Construction Document Phase Cost Estimate

TASK IV – CONSTRUCTION PROCUREMENT

- CPL will submit the necessary documentation in digital format to the Local and State authorities having jurisdiction as well as address any review comments that may arise.
- All permits and approvals for the project will be paid for and secured by others.
- CPL will also assist the CM and answer Requests for Information (RFIs), provide clarifications, issue addenda as required to the CMR's subcontractors during the bidding period.

TASK V – CONSTRUCTION ADMINISTRATION

- Attend one (1) pre-construction meeting.
- Attend bi-weekly site visits / OACs throughout construction duration
- Provide construction administration services consisting of the review of submittals, shop drawings, certification of monthly pay requests, responding to RFIs that arise during the course of construction and closeout documentation.

SCHEDULE – Refer Exhibit 002 (in development)



**PROFESSIONAL FEE PROPOSAL
AMENDMENT 001 - SD, DD, CD, CA**

Union County - SPRAC
Monroe, NC
September 29, 2025

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CLIENT RESPONSIBILITIES

It shall be the responsibility of the client to provide the following:

- Access to the project site during design.
- Reasonable advance notice of scheduled meetings.
- Decisions on critical issues in a timely manner.

INCLUSIONS

1. Geotechnical services
2. Design of site lighting or photometrics
3. Design of full building emergency backup power as a base bid
4. Delegated design of irrigation
5. Attend pre-application meetings during permitting efforts
6. Drawing and specifications for any early bidding packages including:
 - a. Early Site Package – Mass Grading
 - b. Specifications for building generator, switch gear, and other long lead items for early release
 - c. (1) scope validation meeting during each phase of design to address any additional early release packages which will allow all parties to have the appropriate amount of time to respond in the best interest of moving the project forward efficiently and cost effectively.
7. Design of utility connections/extensions on site as necessary
8. PDF As Built drawings
9. Design of retaining wall, if necessary
10. Coordination of N.A.M.E accreditation requirements, verification and documentation.

ASSUMPTIONS / EXCLUSIONS

1. Delivery method is Construction Manager at Risk.
2. Future addition(s) beyond what was identified in the programming and planning deliverables.
3. Permitting or any application fees.
4. Phase I II or II Environmental Site assessments, NC SAM/WAW quality assessments.
5. Protected species or historical resource coordination/surveys.
6. Jurisdictional feature impact permitting.
7. Regional stormwater, water, or sewer studies or related work.
8. Sewer pump station and offsite force main upgrades or design.
9. CPL will incorporate best practice sustainable features as the project's budget and design allows.
10. CPL will coordinate all furniture, fixtures and equipment infrastructure and finish selections. And will provide an overall furniture plan, furniture schedule and furniture specifications for Owner to bid/purchase. CPL can assist with selections from state contracts or as otherwise preferred Procurement of all devices, equipment, and furniture is by owner.
11. CPL's basic telecom/data/security/AV services include:
 - a. Devices are specified and installed by the owner. The design team is responsible for identifying and specifying cabling and pathways (conduit and blank boxes). Locations for security, data, telecom, and AV devices will be identified on the drawings.



**PROFESSIONAL FEE PROPOSAL
AMENDMENT 001 - SD, DD, CD, CA**

Union County - SPRAC
Monroe, NC
September 29, 2025

Page 5 of 7

- b. The county's color-coding system will be identified in the specifications for the Owner and CMR to coordinate / implement.
- 12. Grant applications but can be provided as an additional service.
- 13. Design of public utility extension beyond the project limits, including State utility permitting.
- 14. Third-party special inspections are not included in the base scope of work other than preparing the Statement and Schedule of Special Inspections.
- 15. Altering (increasing/decreasing) the project scope, design, and/or budget from our project understanding and assumptions may trigger a request for additional services. A 3% construction contingency is assumed. Any other project contingency is excluded from consideration of this proposal.
- 16. City, county, and/or state review fees are not included in this proposal, recommend that CM includes in their responsibility.
- 17. We do not anticipate the building being sited in a flood hazard area.
- 18. Life cycle cost analysis.
- 19. We anticipate the following items to be delegated design:
 - Cold-formed metal framing, stair systems, structural steel connections, precast concrete, pre-engineered canopies, glazing systems, pre-engineered building systems, temporary shoring or excavation support systems, prefabricated wood or metal trusses.
- 20. Project budget is assumed to be \$20,000,000. Construction budget is assumed to be \$16,400,000 (with remainder of project budget assumed for soft costs, design fees, furniture, etc.).
- 21. Any additional funding received pertaining to the project will trigger an 8% compensation to the Architect based on the amount of the funding, if the construction cost is modified from the assumed \$16,400,000 as this would be an addition to the total construction budget which the lump sum is based on.



COMPENSATION

CPL agrees to provide the professional design services listed in the Scope of Services. Our fee proposal is based upon work-effort projections and applicable billing rates for the scope of work anticipated for this project. We propose providing our scope of services for a lump sum fee as indicated in the following table.

FEE SCHEDULE	FEE
ADVANCE PLANNING / CONCEPT DESIGN	
Architecture / Medical Examiner Planning / MEP/FP Engineering	122,500.00
Task S01 – S05	48,500.00
Task W01 – W02	9,700.00
Task TR01	17,300.00
Task E01 – E02	9,700.00
Reimbursables Allowance	8,500.00
SUB-TOTAL FEE	216,200.00
AMENDMENT 001 - SD, DD, CD, CA	
Task I – Schematic Design Architecture / Medical Examiner Planning / MEP & FP Engineering	\$220,090
Task II – Design Development Architecture / Medical Examiner Planning / MEP & FP Engineering	\$265,320
Task III – Construction Documents Architecture / Medical Examiner Planning / MEP & FP Engineering	\$414,125
Task IV – Construction Procurement Architecture / Medical Examiner Planning / MEP & FP Engineering	\$79,500
Task V – Construction Administration Architecture / Medical Examiner Planning / MEP & FP Engineering	\$430,970
Civil Engineering	\$108,700
AV, Security, Technology	\$74,900
Design Fee	\$1,590,000

Fee structure continued below.



Additional Services	
Geotechnical Exploration	\$18,400
Seasonal High Water Table Evaluation	\$2,875
Ksat Testing	\$1,725
Shear Wave Velocity Method for Seismic Site Classification	\$1,725
Additional Services Fee	\$24,725
Allowances	
Civil Engineering – Roadway Improvements Allowance – SD Investigation	\$1,500
Civil Engineering – Roadway Improvements Allowance – CDs	\$38,000
Retaining Wall Design Allowance	\$5,000
Reimbursables Allowance for allowable reimbursements as defined in agreement	\$10,000
Allowances Total	\$54,500
Total Amendment 001 Fee	\$1,669,225

ADDITIONAL SERVICES

Any items not contained in our Scope of Services or contrary to the assumptions / exclusions listed above may be deemed additional services. If requested by the Client, additional services will be provided as a fixed fee mutually agreed to in advance by both parties.

CONCLUSION

This document serves as a design fee proposal. The proposed fee is valid for 90 days from the date of this proposal. If these terms are acceptable, we will proceed with negotiating a Standard Design Contract.

We look forward to working with you on the successful completion of this project.
Sincerely,

CPL

Eric Leibenguth, AIA
Principal-in-Charge

cc: Mr. Taylor Bishal (Tbishal@cplteam.com)



Union County, NC

Staff Report

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

File #: 25-645

Agenda Date: 10/20/2025

TITLE:

Adoption of Updated Records Retention Schedules

INFORMATION CONTACT:

Clayton T. Voignier, Assistant County Manager, 704-283-3687; Jason Kay, County Attorney, 704-283-3784

ACTION REQUESTED:

Adopt the 2021 General Records Schedule and 2021 Program Records Schedule for Local Government Agencies for Union County effective October 20, 2025

PRIOR BOARD ACTIONS:

Union County's General Records Schedule was last updated on August 5, 2019

BACKGROUND:

In April 2013, Union County adopted a Records Retention and Disposition Schedule for County Management, which governed how long the County must retain various types of county records to comply with North Carolina law. All records retention and disposition schedules are published and periodically updated by the North Carolina Department of Natural and Cultural Resources Division of Archives and Records ("NC Archives").

In 2019, Government Records were combined into a General Records Schedule for Local Government Agencies, and Union County adopted a General Records Schedule for Local Government Agencies in August of 2019.

In October of 2021, NC Archives published an updated General Records Schedule for Local Government Agencies and a new Program Records Schedule for Local Government Agencies. The 2021 General Records Schedule for Local Government Agencies reorganized and updated the 2019 version to improve clarity and consistency. The most noticeable change is the renaming of the "Personnel Records" section to "Human Resources Records." Several record series were consolidated or clarified to eliminate redundancy, and terminology was updated to reflect electronic recordkeeping practices.

The 2021 Program Records Schedule for Local Government Agencies was a new retention schedule created from the former County Management (last updated in 2013) and Municipal (last updated in 2012) retention schedules. This schedule contains specific functions of government at the county level including Code Enforcement and Inspection Records, Parks and Recreation Records, Planning and Regulation of Development Records, Public Transportation Systems Records, Public Utilities and Environmental/Waste Management Records, and Street Maintenance, Public Works, and

Engineering Records. Most retention periods remain consistent with prior guidance, though descriptions and organization were modernized to improve clarity and align with the format of the General Records Schedule.

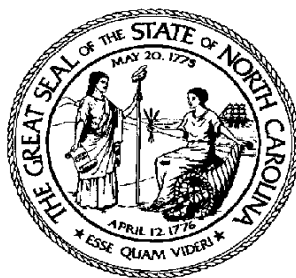
Adoption of the 2021 General Records Schedule and Program Records Schedule for Local Government Agencies will supersede prior versions of these schedules and authorize the County to dispose of records in accordance with State-approved destruction methods.

FINANCIAL IMPACT:

None

RECORDS RETENTION AND DISPOSITION SCHEDULE

GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

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2021 General Records Schedule: Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 General Records Schedule: Local Government Agencies**:

1. Administration and Management Records
2. Budget, Fiscal, and Payroll Records
3. Geographic Information System Records
4. Human Resources Records
5. Information Technology Records
6. Legal Records
7. Public Relations Records
8. Risk Management Records
9. Workforce Development Records

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

G.S. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

“(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.”

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, G.S. § 132-6.1(a) specifies:

“Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software.”

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when “*reference value ends*.” All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “*destroy when reference value ends*.” If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction “*destroy when reference value ends*.”

Record Copy

A record copy is defined as “The single copy of a document, often the original, that is designated as the official copy for reference and preservation.”¹ The record copy is the one whose retention and disposition is mandated by this schedule; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to

¹ Society of American Archivists, *Dictionary of Archives Terminology*.

designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”²

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.

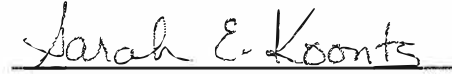
Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary’s seal), they must be retained according to the disposition instructions for the records series encompassing the forms’ function.

² Ibid.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. This schedule supersedes previous versions of this schedule and any localized amendments; it is to remain in effect from the date of approval until it is reviewed and updated.

APPROVAL RECOMMENDED


Municipal/County Clerk or Manager
Title: County Manger



Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: BOCC Chair



D. Reid Wilson, Secretary
Department of Natural and Cultural
Resources

Municipality/County: Union County

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the Local Agency Program Retention and Disposition Schedules. See the appendix for Related Records Series Found in Local Agency Program Schedules.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.

- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.



– symbol designating that one or more records in this series may be confidential or may include confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – “a group of similar records that are . . . related as the result of being created, received, or used in the same activity.” (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS


Official records pertaining to the authority, operating philosophy, methods, primary functions, and routine office administration of local agencies.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.01	ABSTRACTS OF MUNICIPAL ELECTIONS Copies of abstracts prepared by the County Board of Elections and forwarded to the municipal clerk.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u> <i>Retention Note: Official record maintained permanently by the County Board of Elections.</i>	Authority: G.S. 163-300
1.02	ACCREDITATION RECORDS Records documenting accreditations and certifications received by the agency. Includes applications, final reports, and other related records. Also includes evaluations of the agency by outside entities.	Destroy in office 5 years after superseded or obsolete.	Authority: 10A NCAC 48B
1.03	ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES @ Records documenting requirements or directives promulgated by the agency for the conduct of a business or activity on agency premises or under agency authority.	Destroy in office when superseded or obsolete.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.04	AUDITS: PERFORMANCE @ Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records. SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Retain in office permanently reports related to internal compliance or operational audits, hazardous material, or those that document a significant change in agency practices. b) Destroy in office PCI attestation reports after 3 years. c) Destroy in office remaining audit reports after 10 years. d) Destroy in office documentation of corrective measures 2 years after their implementation. e) Destroy in office working papers and remaining records when superseded or obsolete.	
1.05 	BLUEPRINTS AND SPECIFICATIONS @ Blueprints and specifications of agency owned buildings and facilities. Includes as-built plans and related records concerning approved changes.	a) Transfer as-built drawings to new owner when agency relinquishes ownership of building or facility. b) Retain in office as-built drawings for life of structure and then destroy. c) Destroy in office blueprints, floorplans, and other preliminary design and construction documents when superseded or obsolete.	Confidentiality: G.S. 132-1.7

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.06	BONDS Records documenting written guarantees from a third party, including bid bonds, payment bonds, performance bonds, and surety bonds. SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), and Projects (below).	Destroy in office 5 years after expiration or cancellation.	
1.07	BULLETINS Internal information sharing materials that circulate information within the agency. Also includes memoranda and newsletters.	Destroy in office when superseded or obsolete.	
1.08	BUSINESS CERTIFICATION RECORDS Applications and supporting documentation submitted by businesses to be certified as a Small Business Enterprise (SBE) or other classification.	a) Destroy in office all documentation 3 years after most recent recertification. b) If certification was never issued, destroy in office all documentation when reference value ends.± Agency Policy: Destroy in office after <u>6 months</u>	
1.09	BUSINESS DEVELOPMENT SUBJECT FILE	Destroy in office after 3 years.	
1.10	CALENDARS OF EVENTS AND APPOINTMENTS	Destroy in office when superseded or obsolete.	
1.11	CENSUS PROJECT RECORDS Records created to assist the U.S. Census Bureau with the decennial census.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.12	CHARTER RECORDS Charter and charter proceedings related to adoption, amendment and/or repeal.	Retain in office permanently.	
1.13	COLLECTED DATA Information and statistics compiled and analyzed for research purposes or to support the functions of the agency. SEE ALSO: Data Warehouses (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	Destroy in office when superseded or obsolete.	If data contains confidential information, abide by relevant restrictions.

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “destroy when reference value ends.” Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.14	CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS @ Records concerning objections, dissatisfaction, or disagreements with actions or positions taken or not taken by the agency. Includes comments and petitions submitted by constituents requesting action as well as routine requests for service. Also includes requests for reasonable accommodation to the general public under Title II of the Americans with Disabilities Act, Housing and Urban Development Act, 1973 Rehabilitation Act, and Title VII of the Civil Rights Act of 1964; including constituent requests, survey of agency buildings to determine accessibility to the physically handicapped, proposals for implementation, correspondence (including e-mail), and resolutions. SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS).	a) Transfer records as applicable to Litigation Case Records (STANDARD 6: LEGAL RECORDS). b) Destroy in office comments, complaints, petitions, and requests 1 year after resolution.* c) Destroy in office accommodation requests 2 years after resolution.*	Authority: 42 USC 12132
1.15	CONSTITUENT SURVEYS Surveys and related records addressing agency services, policies, and other concerns.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.16	CORRESPONDENCE AND MEMORANDA Administrative and management correspondence/memoranda (including e-mail) written or received by the office concerning agency authority, operating philosophy, purpose, methods, and any other function. For information on handling e-mail and text or instant messages, see ELECTRONIC RECORDS , page A-11. SEE ALSO: Public Bodies: Correspondence (below) and Legal Correspondence (STANDARD 6: LEGAL RECORDS).	a) Transfer correspondence (including e-mail) with historical value to History Records (below), after 3 years. b) Destroy routine administrative correspondence and memoranda after 1 year. c) Destroy in office remaining records after 3 years. <i>Retention Note: The correspondence (including e-mail) of the most senior administrator has historical value and should be retained permanently.</i>	
1.17	CUSTOMER CALL CENTER RECORDINGS @ Recordings of calls to customer service centers made for quality assurance and training purposes.	Destroy in office after 30 days.	
1.18	EQUIPMENT AND VEHICLE MAINTENANCE, REPAIR, AND INSPECTION RECORDS @ Records concerning the maintenance, repair, routine testing, and inspection of agency owned equipment and vehicles. Also includes warranties. SEE ALSO: Grants (below), and System Maintenance Records: Hardware Repair or Service (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Destroy in office records documenting routine inspections, janitorial cleaning, and routine maintenance of equipment and vehicles after 1 year.* b) Destroy in office records documenting all other maintenance and repairs after 3 years.* c) Destroy in office warranties 1 year after expiration.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.19	EQUIPMENT AND VEHICLE REFERENCE RECORDS Includes operation, specification, and technical manuals. Also includes brochures, bulletins, and related documentation.	Destroy in office when superseded or obsolete.	
1.20	EQUIPMENT, FACILITY, AND VEHICLE USAGE RECORDS Records documenting the assignment, request, and usage of agency assets. Also includes mileage and checkout logs, fuel consumption reports, reservation requests, authorizations, utility usage logs, and similar records.	a) Destroy in office after 3 years if records are used for allocating costs or determining payment under rental or lease agreements.* b) Destroy in office remaining records after 1 year.	
1.21	FACILITY MAINTENANCE, REPAIR, AND INSPECTION RECORDS Records documenting maintenance, repair, and inspection of agency-owned facilities, including warranties on said repairs. Also includes any real property owned by the agency. SEE ALSO: Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS), Property Management Records (below).	a) Destroy in office records documenting system repair and improvement (including plumbing, electrical, fire, and other systems) after 3 years. b) Destroy in office records documenting routine inspections, janitorial cleaning, environmental monitoring, and routine maintenance of facilities after 1 year. c) Destroy in office warranties 1 year after expiration.	
1.22	FORMS AND TEMPLATES Blank forms, templates, and letterhead used to create agency records.	Destroy in office when superseded or obsolete.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.23	GRANT PROPOSALS Proposals submitted for grants, including applications, correspondence (including e-mail), and other related records.	a) Transfer records concerning approved grants to Grants (below). b) Destroy in office rejected or withdrawn grant proposals when reference value ends.± Agency Policy: Destroy in office after <u>5 years</u>	
1.24	GRANTS[@] Records concerning approved federal, state, and private grants. File includes applications, reports, records of equipment purchased with grant funds, and all relevant programmatic records. Also includes any required certifications and disclosures, documentation about grants issued by the agency, and research records generated as part of a grant project. SEE ALSO: Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records of state and private grants 5 years after final financial report is filed.* c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed. d) Destroy in office records not relating to a specific grant after 1 year. <i>Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.</i>	Retention: 09 NCAC 03M .0703 2 CFR 200.333

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.


@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.25	HISTORICAL DESIGNATIONS RECORDS Records concerning the awarding of historical markers by the agency. Includes applications, review materials, and list of markers.	a) Retain in office permanently the list of historical markers along with the accepted applications. b) Destroy in office after 1 year rejected applications. c) Destroy in office remaining materials after 3 years.	
1.26	HISTORY RECORDS (AGENCY AND EMPLOYEES) Records concerning the history of the agency and its employees. Includes published and unpublished histories, biographical data, photographs, newspaper clippings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>5 years</u>	
1.27	IMPROPER CONDUCT INVESTIGATIONS Records concerning investigations triggered by questions about ethics or conduct within an agency, such as whistleblower reports or allegations of fraud. Includes complaints, reports, investigations, and other related records. Also includes records from an ombuds office.	Destroy in office 3 years after resolution.*	
1.28	INDICES @ Listings of where specific information can be found.	Destroy in office when superseded or obsolete.	
1.29	INTERAGENCY PROGRAMS Records of programs involving more than one government agency. Includes resource materials, program information, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years</u>	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.


@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.30	INVENTORIES @ Inventories describing the type of property (including equipment and facilities other and fixed assets), its location, and related information. Also includes inventory control and usage records, such as requisitions/draw tickets, mileage logs, request forms, and other related records.	a) Destroy in office lists of properties, facilities, fixed assets, supplies, and surplus property when superseded or obsolete. b) Destroy in office inventory control and usage records after 3 years.	
1.31	LEGISLATION AND REGULATORY RECORDS Notices and copies of proposed or adopted state or federal legislation or regulations affecting the agency.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>5 years</u>	
1.32	LOGISTICS MATERIALS Records concerning scheduled plans of agency personnel and activities. Includes routine notices, task lists, and arrangements.	Destroy in office when superseded or obsolete.	
1.33	MAIL: UNDELIVERABLE/RETURNED Outgoing agency mail returned by the post office for any reason, including insufficient postage, incorrect address, forwarding order expired, etc. Also includes outgoing e-mail returned for any reason.	Destroy in office after 30 days. <i>Retention Note: If notification is necessary for a particular process, reference the relevant case file for disposition instructions (e.g., tax notifications).</i>	
1.34	 MAILING AND DISTRIBUTION RECORDS Includes mailing and meeting notification lists, e-mail distribution lists, Sunshine Lists, and related documentation of transactions with the U.S. Postal Service, state courier, or private carriers.	a) Destroy in office Sunshine Lists when superseded or obsolete. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>8 years</u>	Confidentiality: G.S. 132-1.12 G.S. 132-1.13

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.35	MEMBERSHIP RECORDS Records concerning associations, organizations, groups, etc., with which the agency is involved. Includes records concerning memberships or registrations on behalf of the agency or agency personnel.	Destroy in office when superseded or obsolete.	
1.36	MISCELLANEOUS (NON-BUILDING) APPLICATIONS, LICENSES, AND PERMITS Includes, but not limited to, applications and permits regarding free government-issued business permits, burning, special events, and landscape establishment.	a) Destroy in office 1 year after expiration of license/permit. b) Destroy in office applications for which a license/permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>6 months</u>	
1.37	 OFFICE AND PROPERTY SECURITY RECORDS Records concerning the security of agency offices, facilities, vehicles, equipment, property, and personnel. Includes visitors' register; security, employee, or contractor access to facilities or resources; and surveillance system reports and recordings. SEE ALSO: Employee Security Records (STANDARD 8: RISK MANAGEMENT).	a) If the recording necessitates law enforcement action, transfer to the appropriate agency. b) If the recording becomes evidence in a personnel investigation or lawsuit, transfer to Disciplinary Actions (STANDARD 4: HUMAN RESOURCES RECORDS), or Litigation Case Records (STANDARD 6: LEGAL RECORDS). c) Destroy in office recordings not required to support known investigations or litigation after 30 days. d) Destroy in office remaining records after 1 year.	Confidentiality: G.S. 132-1.7

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.38	ORDINANCES Includes code of ordinances. See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.	a) Retain in office official copy permanently. b) Destroy in office ordinance development records when ordinance is no longer in effect. c) Destroy in office additional copies (including tabled or failed ordinances) when reference value ends.± Agency Policy: Destroy in office after <u>3 months</u>	
1.39	PEST CONTROL Records concerning pest abatement or eradication programs overseen by the agency. SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).	Destroy in office after 3 years.*	
1.40	PHONE LOGS Records documenting calls placed and received in the course of conducting agency business. SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Voice over Internet Protocol (VoIP) Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	Destroy in office after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.41	POLICIES AND PROCEDURES @ Records documenting the formulation, planning, and adoption of policies, procedures, and functions of the agency and its departments. File also includes organizational charts, reorganization studies, and similar records describing the arrangement and administrative structure of the agency. SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS), Electronic Records Policies and Procedures (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
1.42	POLL LIST/REGISTRATION LIST/ROSTER/ AUTHORIZATION TO VOTE (ATV) @ Lists documenting registered electors and votes cast prior to County Board of Elections taking over municipal elections. Includes electronic or paper ATV related records such as ATV books, forms, unused stickers, lists, registers, indexes, or similar records used to verify persons are registered voters at each polling location.	Contact State Archives of North Carolina prior to destroying old poll books and voter registration books.	Authority: G.S. 163 Art. 15A G.S. 163-166.7 08 NCAC 10B .0103 52 USC Chap. 205
1.43	PRICE QUOTATIONS	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u> .	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.44	PROCLAMATIONS AND ORDERS Proclamations and orders issued by the governing board.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>3 months</u>	
1.45	PROJECTS @ Includes project correspondence (including e-mail), feasibility studies, final reports, specifications, assessments, notices to proceed, cost estimates, change orders, statements of work, and similar documentation. SEE ALSO: Project Documentation (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records 3 years after completion of project.	
1.46	PROPERTY MANAGEMENT RECORDS Includes appraisals of the financial valuation of agency-owned property as well as surveys, plats, and maps. SEE ALSO: Facility Maintenance, Repair, and Inspection Records (above).	Destroy in office when superseded or obsolete.	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.47	PUBLIC BODIES: AGENDA AND MEETING PACKETS Includes agendas and copies of supporting documentation and exhibits submitted and discussed during meetings of public bodies. Also includes documentation of outside meetings attended by agency personnel. SEE ALSO: Public Bodies: Minutes (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>8 years</u>	
1.48	PUBLIC BODIES: APPLICATIONS FOR APPOINTMENT Applications and related records received from individuals applying for appointments to serve on public boards, commissions, councils, and committees.	a) Destroy in office records concerning appointed individuals 1 year after expiration of term. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
1.49	PUBLIC BODIES: APPOINTMENT REPORTS Includes annual appointment reports filed with the NC Department of the Secretary of State.	Destroy in office after 2 years.	Authority: G.S. 143-157.1
1.50	PUBLIC BODIES: AUDIO AND VIDEO RECORDINGS OF MEETINGS SEE ALSO: Public Bodies: Minutes (below).	Destroy in office after approval of official written minutes. <i>NOTE: If these serve as the official minutes, as allowed by G.S. 143-318.10(e), their retention should be permanent. These disposition instructions apply to recordings produced solely for the purpose of generating official written minutes.</i>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.51	PUBLIC BODIES: CORRESPONDENCE Records documenting internal and external communications of governing and advisory board members. Includes correspondence (including e-mail) related to decision-making, policy development, and other high-level planning as well as logistical communications.	a) Transfer correspondence (including e-mail) with historical value to History Records (above), after 3 years. b) Destroy in office remaining records after 3 years.	
1.52	PUBLIC BODIES: MEETING NOTICES Includes notices and regular meeting schedules. SEE ALSO: Affidavits of Publication (STANDARD 6: LEGAL RECORDS), Publicity Records (STANDARD 7: PUBLIC RELATIONS RECORDS).	Destroy in office after 1 year.	
1.53	PUBLIC BODIES: MEMBER FILES Records concerning members of public boards, commissions, councils, and committees. Includes codes of conduct, ethics statements, agreements, notices of resignation, and other related records. Also includes biographical information and waivers. SEE ALSO: Oaths of Office (STANDARD 6: LEGAL RECORDS), Public Bodies: Applications for Appointment (above).	a) Retain in office records with historical value permanently. b) Destroy in office 1 year after superseded or obsolete waivers from board members choosing not to receive stipend/per diem payments. c) Destroy in office remaining records 1 year after service ends.	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.54	PUBLIC BODIES: MINUTES Includes minutes of the governing board and all subsidiary and advisory boards. Subsidiary boards are defined as boards that exercise or are authorized to exercise legislative, policy-making, quasi-judicial, or administrative functions. Also includes minutes of subcommittees of the governing board and its subsidiary and advisory boards. See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging. SEE ALSO: Ordinances (above), Public Bodies: Agenda and Meeting Packets (above), Public Bodies: Audio and Video Recordings of Meetings (above), Resolutions (below).	a) Retain in office permanently official minutes of the governing board and its subsidiary boards as well as all attachments necessary to understand the body's actions. b) The official minutes of advisory boards may be destroyed only upon approval by the State Archives of North Carolina. The State Archives reserves the right to designate the minutes of any advisory board as permanent. c) Destroy in office minutes of committees or subcommittees when reference value ends, if the minutes or actions and decisions of the committee are entered as part of the minutes of the parent board. If minutes or actions and decisions of the committee or subcommittee in question are not entered as part of the minutes of the parent board, the State Archives reserves the right to designate the minutes as permanent.± Agency Policy: Destroy in office after <u>N/A - Retain Permanently</u>	Authority: G.S. 143-318.10
1.55	RATE AND FEE SCHEDULES @ Records relating to rates, fees, and regulations concerning agency services.	Destroy in office when superseded or obsolete.	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.56	REBATE PROGRAM RECORDS Applications, receipts, and related records concerning rebate programs sponsored by the agency. These records document programs and incentivized actions that residents may opt into.	a) Destroy in office financial records 3 years after approval.* b) Destroy in office applications 1 year after approval. c) Destroy in office denied applications when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
1.57	RECORDS MANAGEMENT Includes correspondence (including e-mail) with state and/or federal agencies with regards to records retention. Also includes records disposition documentation, file plans, and copies of records retention and disposition schedules.	a) Retain in office documentation concerning the final disposition of records permanently. b) Destroy in office remaining records when superseded or obsolete.	
1.58	REFERENCE (READING) FILE Subject files containing informational copies of records organized by areas of interest. Also includes materials that have no regulatory authority for the recipient and are received from outside the agency or from other units within the agency as well as reference copies of documents where another individual or agency is responsible for maintaining the record copy.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years</u>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.59	<p>REPORTS AND STUDIES @</p> <p>Records concerning the performance of a department, program, or project, as well as those created for planning purposes. Includes all annual, sub-annual, or irregularly prepared research studies, reports, and studies generated by an agency or prepared by consultants hired by the agency. Also includes reports required to be submitted to the agency.</p> <p>SEE ALSO: Accident/Incident Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Audits: Performance (above), Budget Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Civil Rights Records (STANDARD 6: LEGAL RECORDS), Financial Reports (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Grants (above), Lost, Stolen, or Damaged Property Reports (STANDARD 8: RISK MANAGEMENT RECORDS), Projects (above), Public Bodies: Appointment Reports (above), Strategic Plan (below), and Unemployment Compensation Reports (STANDARD 4: HUMAN RESOURCES RECORDS).</p>	<p>a) Retain in office permanently 1 copy of all annual and biennial reports written by the agency.</p> <p>b) Retain in office permanently reports and studies prepared by request of an agency's governing body or a court.</p> <p>c) Destroy in office after 3 years reports prepared monthly, bimonthly, or semi-annually.</p> <p>d) Destroy in office after 1 year activity reports concerning workload measurements, time studies, number of jobs completed, etc., prepared on a daily or other periodic basis.</p> <p>e) Destroy in office when superseded or obsolete reports required to be submitted to the agency.</p> <p>f) Destroy in office remaining reports and studies when reference value ends.±</p> <p>Agency Policy: Destroy in office after <u>3 years</u>.</p> <p><i>Retention Note: Reports and studies listed elsewhere in this schedule should be retained the specified period of time.</i></p>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.60	REQUESTS FOR INFORMATION Requests received and responses issued by the agency. SEE ALSO: Public Records Requests (STANDARD 7: PUBLIC RELATIONS RECORDS).	Destroy in office after 1 year after resolution.	
1.61	REQUESTS FOR PROPOSALS (RFP) Proposals submitted by vendors in response to requests from agency. Also includes notices and evaluations produced by the agency. SEE ALSO: Bids for Purchase (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS), Price Quotations (above).	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years</u>	
1.62	RESOLUTIONS File consists of resolutions indicating date, issues or policy involved, and appropriate signatures. See the SECURITY PRESERVATION COPIES OF RECORDS section on page A-15 for instructions on imaging.	a) Retain in office permanently one copy of final resolution. b) Retain in office permanently resolution development records with historical value. c) Destroy in office additional copies of resolutions (including those tabled or failed) along with all remaining development records when reference value ends.± Agency Policy: Destroy in office after <u>3 months</u>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.63	STAFF MEETINGS FILE Records concerning meetings of internal committees, groups, or task forces along with external meetings attended by agency personnel. Includes minutes, agendas, meeting packets, visual aids, presentations, notes, recordings, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 1 year.	
1.64	STRATEGIC PLAN @ Long-range plan outlining policies, guidelines, and plans for future development of the agency. Includes official copy of strategic plan and all background surveys, studies, and reports. Also includes business plans as well as mission statements, goals, and objectives.	a) Retain in office strategic plans permanently. b) Destroy in office background surveys, studies, and reports 5 years after adoption of plan. c) Destroy in office business plans 2 years after execution of plan. d) Destroy in office remaining records when superseded or obsolete.	
1.65	SURPLUS PROPERTY Inventories and reports of agency property to be surplussed.	Destroy in office 3 years after disposition of property.*	
1.66	TRACKING MATERIALS Records intended to verify the receipt of information, such as certified mail receipts.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years</u>	

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ITEM #	STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
1.67	TRAVEL REQUESTS Requests and authorizations for travel. Includes forms and itineraries. SEE ALSO: Price Quotations (above), Travel Reimbursements (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	Destroy in office after 1 year.*	
1.68	VEHICLE REGISTRATION CARDS North Carolina registration cards for vehicles in the agency fleet. SEE ALSO: Vehicle Titles (STANDARD 6: LEGAL RECORDS).	Destroy in office when superseded.	
1.69	WORK ORDERS Includes date and location of work, cost of materials used and labor, type of work performed, and other related records regarding the repairs of equipment, facilities, and vehicles.	a) If this is the only record documenting completed work, follow disposition instructions for Facility Maintenance, Repair, and Inspection Records (above), or Equipment and Vehicle Maintenance, Repair, and Inspection Records (above). b) Destroy in office remaining records 1 year after work is completed.*	

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STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS

Records created and accumulated concerning the managerial control, budgeting, disbursement, collection, and accounting of the agency.

Note: Per 26 CFR 1.148-5(d)(6)(iii)(E), all records necessary to support the tax-exempt status of an agency debt issue must be retained for the life of the debt plus 3 years.

ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.01	ACCOUNTS PAYABLE Records concerning the status of accounts in which the agency owes money to firms or individuals. Includes invoices, reimbursements, receipts or bills of sale, check registers, and subsidiary registers. Also includes stop payment notices.	a) Destroy in office 5 years after payment documentation of reimbursement for business expenses to employees. b) Destroy in office all remaining records 3 years after payment.*	Retention: 04 NCAC 24D .0501(a)(3)(I)
2.02	ACCOUNTS RECEIVABLE @ Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.	Destroy in office 3 years after collection.*	G.S. 105A

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.03	ACCOUNTS UNCOLLECTABLE Records of accounts deemed uncollectable, including returned checks, write-off authorizations, and other related records.	Destroy in office 3 years after account is determined to be uncollectable.*	
2.04	ANNUAL BUDGET Annual budget and budget message submitted to governing board for approval. SEE ALSO: Budget Reports (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after 3 years. <i>Retention Note: Annual budgets should be entered into the minutes of the governing board.</i>	Authority: G.S. 159-11
2.05	ARBITRAGE RECORDS Records concerning arbitrage rebate calculations and funds rebated.	Destroy in office 3 years after final redemption date of the bonds and after all related debts and obligations have been satisfied.*	Authority: 26 CFR 1.148-3
2.06	AUDITS: FINANCIAL @ Records concerning internal and external audits. Includes reports, working papers, and related records. SEE ALSO: Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently final reports related to internal compliance or operational audits or those that document a significant change in agency practices or have significant administrative value. b) Destroy in office after 10 years final reports related to internal accounting systems and controls and those with limited administrative value. c) Destroy in office working papers and remaining records when superseded or obsolete.*	Authority: G.S. 159-34
2.07	AUTHORIZATION FORMS Authorization to purchase materials.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.08	BANK STATEMENTS AND RECONCILIATIONS Includes bank statements, canceled checks, deposit slips, and reconciliation reports.	Destroy in office after 3 years.*	
2.09	BIDS FOR DISPOSAL OF PROPERTY Records concerning the disposal of surplus property. Includes information about various disposition procedures used, such as sealed bids and public auction. SEE ALSO: Accounts Receivable (above).	Destroy in office all records after the disposition of property has been recorded in governing board's minutes.*	Authority: G.S. 153A-176
2.10	BIDS FOR PURCHASE Records documenting quotes to supply products and services. Includes advertisements, tabulations, awards letters, records of bids, good faith effort documentation, and related records concerning accepted and rejected bids.	a) Transfer records to Contracts, Leases, and Agreements (STANDARD 6: LEGAL RECORDS) when bid is approved. b) Destroy in office bid records not awarded or opened after 1 year.*	Authority: G.S. 143 Article 8
2.11	BOND CLOSING RECORDS Includes applications, agreements, tax records, contracts, official statements, legal opinions, rating letters, public hearing bonds, title insurance, deeds of trust, and other related records concerning bonds issued by the agency. Also includes records concerning expenditure and/or investment of bond proceeds.	Destroy in office 6 years after final maturity.*	Authority: G.S. 159 Article 7

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.12	BOND REGISTER Records of all bonds, notes, and coupons issued by the agency detailing the purpose of issuance, the date of issue, serial numbers (if any), denomination, maturity date, and total principal amount.	Retain in office permanently.	Authority: G.S. 159-130
2.13	BONDS, NOTES, AND COUPONS	Destroy in office 1 year from date of payment.	Authority: G.S. 159-139
2.14	BUDGET ADMINISTRATION RECORDS Records of budget administration. Includes research, correspondence (including e-mail), and other related records.	Destroy in office after 2 years.*	
2.15	BUDGET EXECUTION RECORDS Records of authorizations to move funds between budget codes.	Destroy in office when released from audits.	
2.16	BUDGET REPORTS Includes daily detail reports and monthly budget reports. Also includes contract budget and expenditure reports and summaries of tax allocations. SEE ALSO: Annual Budget (above).	a) Destroy in office daily detail reports after 1 year.* b) Destroy in office remaining reports after 3 years.*	
2.17	BUDGET REQUESTS AND WORKING PAPERS Includes budget requests, cost estimates, expenditures, program requests, salary and wage lists, correspondence (including e-mail), and related records.	Destroy in office after 3 years.*	Authority: G.S. 159-10

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.18	BUDGET RESOLUTIONS AND ORDINANCES Includes project ordinances, budget resolutions, and amendments. SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain official copies in the minutes of the governing board. b) Destroy in office remaining copies when reference value ends.± Agency Policy: Destroy in office after <u>5 years</u>	Authority: G.S. 159-8 G.S. 159-13 G.S. 159-13.2 G.S. 159-15
2.19	COST ALLOCATION PLANS Accounting report that calculates and spreads agency-wide indirect costs to departments and funds that receive a service from other departments.	Destroy in office after 3 years.*	
2.20	 CREDIT/DEBIT/PROCUREMENT CARD RECORDS Records of assignment of agency credit cards and purchasing cards along with authorization logs.	Destroy in office when superseded or obsolete.*	Confidentiality: G.S. 132-1.2(2)
2.21	DONATIONS AND SOLICITATIONS Records concerning requests made to agency by outside organizations. Includes applications and other related records. SEE ALSO: Fund Drive and Event Records (STANDARD 7: PUBLIC RELATIONS RECORDS).	a) Destroy in office records supporting approved donations 1 year after payment. b) Destroy in office rejected applications after 30 days.	
2.22	 ELECTRONIC FUNDS TRANSFERS (EFT) Includes forms authorizing electronic transfer of monies via wire transfer or automated clearing house (ACH) as well as ACH bank reports.	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 14-113.20

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.23	ESCHEATS AND UNCLAIMED PROPERTY Records containing information required to be included in holder reports submitted to the State Treasurer's office.	a) Destroy in office after 10 years if report was filed prior to July 16, 2012.* b) Destroy in office after 5 years if report was filed on or after July 16, 2012.*	Authority: G.S. 116B-60 Retention: G.S. 116B-73
2.24	FINANCIAL JOURNALS AND LEDGERS	a) Destroy in office year-end summaries of receipts and disbursements after 3 years.* b) Destroy in office daily, monthly, or quarterly transaction detail journals and ledgers after 1 year.*	
2.25	FINANCIAL REPORTS	a) Destroy in office annual financial reports or other reports generated to inform decision-making after 3 years.* b) Destroy monthly or quarterly reports generated for operational purposes after 1 year. c) Destroy logs and distribution reports generated to track transactions when released from audits.	
2.26	GOVERNMENT EMPLOYEES RETIREMENT SYSTEM MONTHLY REPORTS Reports produced by the North Carolina Department of State Treasurer regarding the Teachers' and State Employees' Retirement System (TSERS) and the Local Governmental Employees' Retirement System (LGERS).	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years</u>	

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.27	GRANTS: FINANCIAL @ Records concerning approved federal, state, and private grants received or issued by the agency. Includes all relevant accounting, purchasing, payroll, and other financial records. SEE ALSO: Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy records supporting the expenditure of federal funds passed through NC Dept. of Health and Human Services on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records of state and private grants 5 years after final financial report is filed.* c) Destroy in office records of grants funded by local appropriations and other federal grants 3 years after final financial report is filed. d) Destroy in office records not relating to a specific grant or to grants not funded after 1 year. <i>Retention Note: According to 2 CFR 200.333(c), records for real property and equipment acquired with Federal funds must be retained for 3 years after disposition of the property/equipment.</i>	Retention: 09 NCAC 03M .0703 2 CFR 200.333
2.28	INVESTMENTS Includes fund information, portfolio listings and reports, balance sheets, exchange or consent instructions, broker confirmations, notices, and other documentation related to agency investments. Also includes transaction schedules for projecting revenue on investments as well as performance investment reports issued by broker or investment firm.	a) Destroy in office transaction schedules after 2 years.* b) Destroy in office performance investment reports when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u> c) Destroy in office all remaining records after 3 years.*	Authority: G.S. 159-30

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.29	LOAN RECORDS Records concerning loans received by the agency. Includes documentation of intent to proceed, loan agreements, promissory notes, letters of credit, statements, notices of principal and interest due, and other related records.	Destroy in office 5 years after satisfaction or cancellation of loan.*	
2.30	LOCAL GOVERNMENT COMMISSION FINANCIAL STATEMENTS	Destroy in office after 3 years.*	Authority: G.S. 159-33
2.31	LONGEVITY PAY	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.32	 PAYMENT CARD DATA Records created in association with payment card transactions entered by third parties for the purchase of goods or services from the agency.	Destroy in office after processed.*	Confidentiality: G.S. 132-1.2(2) G.S. 132-1.10(b)(5)

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.33 	PAYROLL AND EARNINGS RECORDS Records containing information such as the name, Social Security number, number of hours worked, compensation rate, deductions, and total wages paid each employee per payroll period. Also includes employer contributions (e.g., retirement, healthcare) along with individual and group employee earnings records and payroll registers showing earnings and deductions for each pay period. SEE ALSO: Payroll Deduction Records (below), Time Sheets, Cards, and Attendance Records (below); for 401(k) and other retirement plan payouts, see Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office 30 years from date of separation records necessary for retirement or similar benefits verification. b) Destroy in office remaining records after 5 years.*	Authority: 29 CFR 516.30(a) Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a) 29 CFR 516.5(a) 29 CFR 1627.3(a)

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.34 	PAYROLL DEDUCTION RECORDS Records used to start, modify, or stop all voluntary or required deductions from payroll. Includes tax withholding (NC-4, W-4), retirement and deferred compensation, savings plans, insurance, association dues, orders of garnishment, etc. Used as proof the employee approved of the deduction(s). SEE ALSO: Payroll and Earnings Records (above), Retirement Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office tax withholding forms 4 years after termination of deduction.* b) Destroy in office authorizations for deductions for retirement contributions, bank payments, savings plans, insurance, and dues 2 years after termination of deduction. c) Destroy in office remaining records 3 years after termination of deduction.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: IRS Publication 15 29 CFR 516.6(c)(1)
2.35	POWELL BILL RECORDS Records include certified statements, expenditures reports, information sheets, financial statements submitted to the North Carolina Department of Transportation, and all other related records.	Destroy in office after 3 years.	
2.36	PURCHASE ORDERS Records, forms, packing slips, and attached documents concerning purchased supplies, equipment, and services. SEE ALSO: Grants: Financial (above).	Destroy in office after 3 years.* <i>Retention Note: Packing slips may be destroyed upon verification of items received if they are not the only record of the purchase of the item.</i>	
2.37	QUALIFIED PRODUCTS LISTS (QPL) Records identifying products approved for purchase by the agency.	Destroy in office 3 years after superseded or obsolete.*	

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.38	REQUISITIONS Requests for payment or to acquire goods or services. SEE ALSO: Inventories (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office after 1 year.*	
2.39	SCHOLARSHIP RECORDS Records concerning scholarships awarded by the agency. Includes applications, award letters, conditions and stipulations, agreements and contracts, disbursement statements, progress reports, and other related records.	a) Destroy in office after 3 years records documenting the awarding of scholarships. b) Destroy in office 1 year after notification of applicant records concerning applications that are denied by the agency or awards that are declined by the recipient.	
2.40	SHIFT PREMIUM PAY Authorizations and other related records concerning employees receiving shift premium pay.	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.41	STATEMENTS OF BACK PAY Forms used to determine the gross pay an employee would have earned during a specified period for back pay in a grievance decision, settlement agreement, or other order.	Destroy in office 3 years after payment.*	

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.42 	TAX FORMS Tax information returns generated by the agency (e.g., 1098, 1099, W-2, W-3) to be reported to the Internal Revenue Service and furnished to the other party to the transaction.	Destroy in office 5 years after submitted to taxpayer and/or IRS.*	Confidentiality: G.S. 132-1.10 G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a) IRS Publication 15
2.43	TAX RETURNS Tax returns filed by the agency.	Destroy in office 6 years after filed.*	
2.44	TIME SHEETS, CARDS, AND ATTENDANCE RECORDS Records documenting the work hours and attendance of employees. SEE ALSO: Payroll and Earnings Records (above).	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a) 29 CFR 516.6(a)(1)

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ITEM #	STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
2.45	TRAVEL REIMBURSEMENTS Includes requests and authorizations for reimbursement for travel and related expenses. SEE ALSO: Grants: Financial (above), Travel Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
2.46 	VENDORS Files maintained on specific vendors authorized or debarred from doing business with the agency. Includes name and address, correspondence (including e-mail), and other related records.	Destroy in office when superseded or obsolete.	

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STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS

Official records received and created by agency geographic information system programs. See G.S. 132-10 for information about providing public access to GIS databases.

ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.01	GEOGRAPHIC INFORMATION SYSTEM (GIS) CORE DATA Geo-referenced data and metadata to facilitate the management, manipulation, analysis, modeling, representation, and spatial analysis of complex problems regarding planning and management of resources.	Retain in office parcel, boundary, zoning, and orthoimagery layers (with accompanying data sets) permanently. <i>Retention Note: Other datasets should be kept according to standards and procedures set by the North Carolina Geographic Information Coordinating Council. See also GEOSPATIAL RECORDS, page A-13.</i>	
3.02	GEOGRAPHIC INFORMATION SYSTEM (GIS) DATA DOCUMENTATION (METADATA) Records created during development or modification of an automated system which are necessary to access, retrieve, manipulate, and interpret data in that system; and records that explain the meaning, purpose, structure, local relationships, and origin of the data elements. Includes data element dictionaries, file layout, codebooks and tables, and definition files.	Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.03	GEOGRAPHIC INFORMATION SYSTEM (GIS) INTERNAL STANDARDS AND PROCEDURES Includes requirements that are intended to make hardware, software, and data compatible and that cover data capture, accuracy, sources, base categories, output, and data element dictionaries.	Retain in office permanently.	
3.04	GEOGRAPHIC INFORMATION SYSTEM (GIS) MONITORING RECORDS Includes system security, quality assurance, transaction tracking, and other related activity monitoring records.	Destroy in office after 1 year.	
3.05	GEOGRAPHIC INFORMATION SYSTEM (GIS) OPERATIONAL RECORDS Includes user guides, system flowcharts, job or workflow records, system specifications, and similar documentation.	Destroy in office when the system is discontinued or when system data has been transferred to a new operating environment (platform).	
3.06	GEOGRAPHIC INFORMATION SYSTEM (GIS) PROJECT RECORDS	a) Retain in office GIS datasets and accompanying documentation (metadata) with historical and/or legal value permanently. b) Destroy in office remaining items when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.07	LAYERS: ADDRESS POINTS See also GEOSPATIAL RECORDS , page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	
3.08	LAYERS: CORPORATE LIMITS See also GEOSPATIAL RECORDS , page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.09	LAYERS: EXTRATERRITORIAL JURISDICTIONS See also GEOSPATIAL RECORDS , page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	
3.10	LAYERS: ORTHOIMAGERY See also GEOSPATIAL RECORDS , page A-13.	Create a snapshot of dataset when created. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.11	LAYERS: STREET CENTERLINE See also GEOSPATIAL RECORDS , page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	
3.12	MAPPING PROJECT RECORDS Includes contract maps and all deliverable products for aerial photography, orthophotography, cartographic, cadastral, and digital mapping projects. See also GEOSPATIAL RECORDS , page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.13	MAPS: PARCEL Maps, including cadastral maps, and surveys of boundaries and measurements of each parcel, and information about encroachments, right-of-ways, and structures. See also GEOSPATIAL RECORDS , page A-13, and Property Management Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Paper: Destroy in office upon State Archives approval. GIS dataset: Create a snapshot of dataset quarterly. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	
3.14	MAPS: PARKS Includes park boundaries, facilities, landscaping, topography, and other pertinent information. Also includes maps and drawings stored and generated by Geographic Information System (GIS) and computer-aided design (CAD) systems. See also GEOSPATIAL RECORDS , page A-13.	Paper: Retain in office permanently. GIS dataset: Create a snapshot of dataset annually. To maintain permanently, <i>Either:</i> Transfer snapshot to NCOneMap according to established procedures, complying with standards and procedures adopted by the North Carolina Geographic Information Coordinating Council . <i>Or:</i> If retained in office permanently, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council .	

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ITEM #	STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
3.15	MAPS: ALL OTHER @ Includes field maps, soil, topographic, sales, subdivision plats, right-of-way, sectional, highway, etc. Also includes paper maps.	a) Retain in office maps, including GIS datasets and accompanying documentation (metadata), with historical and/or legal value permanently. b) Destroy in office remaining items when reference value ends.± <i>Retention note: Contact the State Archives of North Carolina before destroying any tax maps, watershed maps, or zoning maps.</i> Agency Policy: Destroy in office after <u>7 years</u>	


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STANDARD 4: HUMAN RESOURCES RECORDS

Official records and materials created and accumulated incidental to the employment, qualifications, training, and pay status of agency employees. Comply with applicable provisions of G.S. 115C Article 21A (LPSUs), G.S. 122C-158 (area authorities), G.S. 130A-45.9 (public health authorities), G.S. 153A-98 (county), G.S. 160A-168 (municipal), G.S. 161E-257.2 (public hospitals), and G.S. 162A-6.1 (water and sewer authorities) regarding confidentiality of personnel records.


ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.01	ABOLISHED POSITIONS Records concerning positions that have been abolished.	Destroy in office after 1 year.	
4.02 	ADMINISTRATIVE INVESTIGATIONS Records concerning the investigation of conduct problems among agency personnel. SEE ALSO: Disciplinary Actions (below).	a) Destroy in office after 3 years records concerning complaints against agency personnel that are resolved without an internal investigation. b) Destroy in office after 5 years records concerning complaints lodged against agency personnel that are exonerated. c) Destroy in office 5 years after final disposition or expiration of relevant statute of limitations complaints lodged against agency personnel that are settled out-of-court. d) Transfer investigation reports, disciplinary actions, and other related internal affairs case records to Personnel Records (Official Copy) (below).	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.03 	APPLICATIONS FOR EMPLOYMENT Records submitted by job applicants for vacant positions or by current employees for promotion, transfer, or training opportunities. Includes applications, transcripts, resumes, letters of reference, and other related records.	a) Transfer applications, resumes, transcripts, and similar records as applicable to Personnel Records (Official Copy) (below) or Seasonal and Contract Worker Records (below). b) Destroy in office after 2 years unsolicited application materials from individuals hired. c) Destroy in office records concerning individuals not hired 2 years after date of receipt, if no charge of discrimination has been filed. If charge has been filed, destroy in office 1 year after resolution of charge.* d) Destroy in office 2 years after receipt unsolicited applications/resumes and those received after posted closing dates.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31
4.04	APPRENTICESHIP PROGRAM RECORDS Records concerning registered apprenticeship programs. Includes applications and selection materials as well as aggregated data. Also includes apprenticeship affirmative action plans.	Destroy in office 5 years after the making of the record or the personnel action involved, whichever occurs later.	Authority: 29 CFR 30.4(a) 29 CFR 1602.20 Retention: 29 CFR 30.12(d) 29 CFR 1602.21

4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.05 	APTITUDE AND SKILLS TESTING RECORDS Records concerning aptitude and skills tests required of job applicants or of current employees to qualify for promotion or transfer. Includes civil service examinations. SEE ALSO: Employment Selection Records (below).	Destroy in office after 2 years.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)(iv)
4.06	ASBESTOS TRAINING Records concerning training programs about the proper management of asbestos. SEE ALSO: Bloodborne Pathogen Training (below), Hazardous Materials Training Records (below).	a) Destroy in office employee-specific records 1 year after separation. b) Destroy in office remaining records when superseded or obsolete.	Retention: 29 CFR 1910.1001(m)(4)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.07	BENEFITS RECORDS Records concerning life, health, accident, and disability insurance plans as well as seniority and merit systems. Includes records concerning systems in which employees can select fringe benefits from a cafeteria plan, including flexible spending plans. File also includes notifications, election and claim forms, rejection letters, and other records related to COBRA (Consolidated Omnibus Budget Reconciliation Act).	a) Destroy in office approved claims forms after 2 years.* b) Destroy in office rejected requests 6 months after decision. c) Destroy in office 3 years after employee returns or eligibility expires notifications to employees or dependents informing them of their rights to continue insurance coverage after termination or during disability or family leave. d) Destroy in office remaining records 1 year after plan is terminated.	Retention: 29 CFR 1627.3(b)(2)
4.08	BLOODBORNE PATHOGEN TRAINING Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors. SEE ALSO: Asbestos Training (above), Hazardous Materials Training Records (below).	Destroy in office after 3 years.	Retention: 29 CFR 1910.1030(h)(2)(ii)
4.09	DIRECTORIES, ROSTERS, OR INDICES Includes records listing employees, their job titles, work locations, phone numbers, e-mail addresses, and similar information.	Destroy in office when superseded or obsolete.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.10	DISABILITY SALARY CONTINUATION CLAIMS Forms used by disabled employees to apply for salary continuation benefits. Also include short-term disability claims forms and other related records.	a) Transfer original forms to Local Government Employees' Retirement System (LERS) or Teachers' and State Employees' Retirement System (TSERS) for action when received. b) Destroy in office remaining records after 3 years.	
4.11	DISCIPLINARY ACTIONS Correspondence (including e-mail) and other records concerning disciplinary actions taken against employees by personnel or supervisory staff, including records documenting terminations. Includes records created by civil service boards when considering, or reconsidering on appeal, an adverse action against an employee.	a) Transfer records as applicable to Personnel Records (Official Copy) (below). b) Destroy in office all remaining records 2 years after resolution of all actions.	Authority: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 Subject to the public information provision delineated in the above authorities.

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.12	DUAL EMPLOYMENT Records concerning employees' requests and authorizations to accept employment with another local government agency. SEE ALSO: Secondary Employment (below).	a) Destroy in office approved requests and related records 1 year after employee terminates additional employment. b) Destroy in office denied requests and related records after 6 months.	
4.13	 EDUCATIONAL LEAVE AND REIMBURSEMENT Includes records requesting educational leave and tuition assistance, reimbursements, and other related records. SEE ALSO: Leave Records (below).	a) Transfer records documenting approved leave requests to Personnel Records (Official Copy) (below). b) Destroy in office records concerning denied requests 6 months after denial.* c) Destroy in office records concerning approved tuition reimbursements 3 years after reimbursement.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.14	 EMPLOYEE ASSISTANCE PROGRAMS Records documenting assistance and counseling opportunities. Includes requests for information, referrals, forms, releases, correspondence, and other related records.	Destroy in office after 3 years.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.15 	EMPLOYMENT ELIGIBILITY RECORDS Includes the I-9 forms, employment authorization documents filed with the U.S. Department of Labor, petitions filed by the agency, E-Verify documentation, and Selective Service Registration compliance forms.	a) I-9 forms have mandatory retention throughout the duration of an individual's employment. After separation, destroy records in office 3 years from date of hire or 1 year from separation, whichever occurs later. b) Destroy in office after 5 years employment authorization documents filed with the U.S. Department of Labor. c) Destroy in office immigrant or nonimmigrant petitions filed by the agency 3 years after employee separation. d) Destroy in office remaining records 1 year after employee separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 8 USC 1324a(b)(3)
4.16 	EMPLOYMENT SELECTION RECORDS Records concerning the selection of applicants for vacant positions or of current employees for promotion, transfer, or training opportunities. Includes interview documentation, rosters, eligibility lists, test ranking sheets, justification statements, background and criminal history checks, and similar records. SEE ALSO: Applications for Employment (above), Aptitude and Skills Testing Records (above).	a) Destroy in office background and criminal history checks after 5 years. b) Destroy in office remaining records 2 years after hiring decision.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 1602.31 29 CFR 1627.3(b)(1)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.17 	EXIT INTERVIEW RECORDS Includes feedback from employees planning to separate from the agency.	Destroy in office after 1 year.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.18 	FAMILY MEDICAL LEAVE ACT (FMLA) RECORDS Records concerning leave taken, premium payments, employer notice, medical examinations considered in connection with personnel action, disputes with employees over FMLA, and other related records. SEE ALSO: Leave Records (below).	Destroy in office 3 years after leave ends.*	Authority: 29 CFR 825.110 Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 825.500(b)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.19 	GRIEVANCES Includes initial complaint by employee, investigation, action, summary, and disposition. SEE ALSO: Disciplinary Actions (above), Personnel Records (Official Copy) (below).	Destroy in office after 2 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.20	HAZARDOUS MATERIALS TRAINING RECORDS Includes records showing date of training, sessions, contents or summaries of sessions, names of employees attending, and names and qualifications of instructors. May also include documentation of loans of radioactive materials for the purpose of training exercises. SEE ALSO: Asbestos Training (above), Bloodborne Pathogen Training (above).	Destroy in office after 5 years.	Authority: 29 CFR 1910.120(p)(8)(iii) 10A NCAC 15
4.21	INTERNSHIP PROGRAM Records concerning interns and students who work for the agency.	Destroy in office after 2 years.	
4.22	LAW ENFORCEMENT TRAINING Records concerning internal training for law enforcement personnel.	Retain in office permanently.	

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.23 	LEAVE RECORDS Records concerning employee leave, including requests for and approval of sick, vacation, overtime, buy-back, shared, donated, etc. Also includes records documenting leave without pay. SEE ALSO: Educational Leave and Reimbursement (above), Family Medical Leave Act (FMLA) Records (above), Military Leave (below).	a) Destroy in office approved requests 3 years after return or separation of employee.* b) Destroy in office denied requests after 6 months.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.24 	MEDICAL RECORDS Records for employees, contractors, and volunteers concerning asbestos, toxic substances, and bloodborne pathogen exposure; physical examinations required by the employer in connection with any personnel action, including health or physical examination reports, or certificates created in accordance with the Americans with Disabilities Act (ADA); and records of injury or illness. (Does not include worker's compensation or health insurance claim records.) SEE ALSO: Benefits Records (above), Workers' Compensation Program Claims (below).	a) Destroy in office exposure records 30 years after date of exposure.* b) Destroy in office records pertaining to first-aid job-related illness and injury after 5 years. c) Provide medical records to employees who have worked for less than 1 year at time of separation. d) Destroy in office after 1 year records concerning physical examinations or health certificates. e) Destroy in office remaining records 30 years after employee separation. <i>Retention Note: Records must be maintained separately from an employee's personnel jacket. If part of a worker's compensation claim, follow disposition for Workers' Compensation Program Claims (below).</i>	Authority: 29 CFR 1910.1020(e) Confidentiality: 29 CFR 1630.14(c)(1) 29 CFR 1910.1030(h)(1)(iii) Retention: 29 CFR 1627.3(b)(1)(v) 29 CFR 1910.1020(d) 42 USC 12112(d)(3)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.25	MILITARY LEAVE Records concerning military leave, as established by the Uniformed Services Employment and Reemployment Rights Act (USERRA). SEE ALSO: Leave Records (above).	Destroy in office 3 years after leave ends or employee separates from agency.*	Authority: 5 CFR 1208
4.26	 PERFORMANCE REVIEWS Information used to establish employees' goals and primary tasks. Records used to evaluate each employee's work performance. SEE ALSO: Personnel Records (Official Copy) (below).	Destroy in office after 3 years.	Confidentiality (applies only to performance evaluations): G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 60A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.27	PERSONNEL ACTION NOTICES Records used to create or change information in the personnel records of individual employees concerning such issues as hiring, termination, transfer, pay grade, and position or job title.	Transfer records to Personnel Records (Official Copy) (below).	Subject to the public information provision delineated in relevant General Statutes.

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.28 	PERSONNEL RECORDS (OFFICIAL COPY) Official copy of personnel file maintained on each permanent and temporary agency employee that is eligible for benefits. Includes basic employee information and records and forms relating to the selection or non-selection, promotion, transfer, leave, salary, suspension, and termination of employment. Note: For agencies responsible for maintaining personnel files for criminal justice officers, please consult 12 NCAC 09C .0307 for the mandatory records of certification that must be housed in the personnel file. SEE ALSO: Medical Records (above), Seasonal and Contract Worker Records (below).	a) Destroy in office after 30 years from date of separation information needed to document: date and amount of each increase or decrease in salary with that agency; date and type of each promotion, demotion, transfer, suspension, separation, or other change in position classification with that agency; date and general description of the reasons for each promotion with that agency; date and type of each dismissal, suspension, or demotion for disciplinary reasons taken by the agency; and, if the disciplinary action was a dismissal, a copy of the written notice of the final decision of the agency setting forth the specific acts or omissions that are the basis of the dismissal. b) Destroy in office information necessary to verify benefits 30 years after date of separation. c) Destroy in office remaining records when individual retention periods are reached as noted in individual items in this Records Retention and Disposition Schedule.	Authority/ Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.29 	PERSONNEL RECORDS (SUPERVISOR COPY) Personnel jacket that is often maintained by supervisors.	a) Transfer records as applicable to Personnel Records (Official Copy) (above). b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>3 years</u>	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.30	POLICIES AND PROCEDURES (PERSONNEL) Official internal agency personnel policies and procedures. Also includes agreements and authorizations required of employees, orientation materials, and informational data. SEE ALSO: Civil Rights Records (STANDARD 6: LEGAL RECORDS), and Workers' Compensation Program Administration (below).	a) Retain in office internal agency personnel policies and procedures permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.31	 POLYGRAPH RECORDS Includes statements informing employee of the time, place, and reasons for the test; copy of notice sent to examiner identifying employee to be tested; and copies of opinions, reports, or similar records generated by the examiner and provided to the agency.	Destroy in office 3 years from the date the test was given, or from the date the test was requested if no examination was given.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 29 CFR 801.30

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.32	POSITION CLASSIFICATION, CONTROL, AND HISTORY Records concerning personnel actions and position control, status of each established permanent, temporary full-time, or part-time position, and other related topics. Also includes listings providing classification, titles, and position numbers. SEE ALSO: Position Descriptions (below).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.33	POSITION DESCRIPTIONS Includes information on job title, grade, duties, agency assigned, and responsibilities.	Destroy in office 2 years after superseded.	Retention: 29 CFR 1620.32
4.34	POSITION EVALUATIONS Forms used to evaluate the primary purpose of a position.	Destroy in office after 1 year.	
4.35	RECRUITMENT RECORDS Includes ads and notices of overtime, promotion, and training. Also includes employment listings.	Destroy in office 1 year from date of record.	Retention: 29 CFR 1627.3(b)

4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.36	RETIREMENT RECORDS Includes descriptive information about retirement systems along with plans and related records outlining the terms of employee pension and other deferred compensation plans, including 401(k). SEE ALSO: Payroll and Earnings Records; Payroll Deduction Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Destroy in office descriptive information about retirement plans 1 year after plan is terminated. b) Destroy in office records concerning employer-sponsored retirement plans 7 years after payment.* c) Transfer Local Governmental Employees' Retirement System (LGRS) forms to Department of State Treasurer. d) Transfer applicable records to Personnel Records (Official Copy) (above).	Retention: 29 CFR 1627.3(b)(2)
4.37	 SEASONAL AND CONTRACT WORKER RECORDS Records concerning seasonal or contractual employees who are not provided with or eligible for benefits. SEE ALSO: Personnel Records (Official Copy) (above).	Destroy in office 5 years after date of separation.	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1
4.38	SECONDARY EMPLOYMENT Records concerning employees' requests and authorizations to accept employment with a private entity. SEE ALSO: Dual Employment (above.)	a) Destroy in office approved requests and related records 1 year after employee terminates outside employment. b) Destroy in office denied requests and related records after 6 months.	

4: HR

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.39	SERVICE AWARDS AND COMMENDATIONS Includes award and selection committee reports, nominations, selection criteria, and similar administrative records relating to employee recognition or incentive programs. SEE ALSO: Personnel Records (Official Copy) (above).	Destroy in office 2 years from date of record creation or the personnel action involved.	
4.40	SUGGESTIONS AND SURVEYS Recommendations and feedback submitted by agency employees.	Destroy in office after 1 year.	
4.41	TRAINING AND EDUCATIONAL RECORDS Records concerning the delivery of training to agency personnel. Includes training manuals, syllabi and course outlines, and other related records. Also includes employee-specific records (certificates, transcripts, test scores, etc.) relating to the training, testing, or continuing education of employees. SEE ALSO: Conferences and Workshops (STANDARD 7: PUBLIC RELATIONS RECORDS), Educational Leave and Reimbursement (above). Other required trainings are handled in Asbestos Training (above), Bloodborne Pathogen Training (above), Hazardous Materials Training Records (above), Law Enforcement Training (above).	a) Transfer records as applicable to Personnel Records (Official Copy) (above), if such training and testing is required for the position held or could affect career advancement. b) Destroy in office certifications and other qualifications 5 years after expiration or employee separation. c) Destroy in office general training materials when superseded or obsolete. d) Destroy in office remaining employee-specific records after 1 year.	Retention: 29 CFR 1627.3(b)(1)(iv)

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.42 	UNEMPLOYMENT COMPENSATION CLAIMS Claim forms and other related records concerning unemployment compensation cases.	Destroy in office after 5 years.*	Confidentiality: G.S. 115C Art. 21A G.S. 122C-158 G.S. 130A-45.9 G.S. 153A-98 G.S. 160A-168 G.S. 161E-257.2 G.S. 162A-6.1 Retention: 04 NCAC 24D .0501(a)
4.43	UNEMPLOYMENT COMPENSATION REPORTS Quarterly reports showing month-to-date wages, month-to-date compensation, year-to-date wages, and year-to-date compensation for each employee. May be filed with NC Division of Employment Security.	Destroy in office after 5 years.*	Retention: 04 NCAC 24D .0501(a)
4.44	UNEMPLOYMENT INSURANCE Forms submitted to the Department of Commerce to report wage records of terminated employees.	Transfer to the N.C. Department of Commerce, Division of Employment Security.	
4.45	VERIFICATION OF EMPLOYMENT RECORDS Inquiries and responses concerning verification of an employee's prior or current employment with the agency.	Destroy in office after 1 year.	
4.46	VOLUNTEER RECORDS Records concerning individuals who volunteer to assist with various agency activities.	Destroy in office 2 years after completion of assignment.	

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ITEM #	STANDARD 4: HUMAN RESOURCES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
4.47	WORK SCHEDULES AND ASSIGNMENTS Records concerning work, duty, shift, crew, or case schedules, rosters, or assignments.	Destroy in office after 1 year.	
4.48	WORKERS' COMPENSATION PROGRAM ADMINISTRATION Includes program policies, guidelines, and related administrative documentation.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
4.49 	WORKERS' COMPENSATION PROGRAM CLAIMS Records concerning workers' compensation claims filed by employees' supervisors concerning accidental injuries or illnesses suffered on the job. Includes Employer's Report of Injury to Employee (Form 19), accident investigation reports, medical reports, claim cost reports, reference copies of medical invoices, and other related records. <i>Note: All official copies of claims records should be transferred to the North Carolina Industrial Commission in compliance with G.S. 97-92(a).</i>	Destroy in office agency's working file for workers' compensation claims by its employees 5 years after employee returns to work or separates from agency.*	Confidentiality: G.S. 8-53 G.S. 97-92(b)

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STANDARD 5: INFORMATION TECHNOLOGY (IT) RECORDS


Information technology encompasses all activities undertaken by agency to design, develop, and operate electronic information systems. This section covers records for which Information Technology personnel are responsible, including administrative records and those used to process data and monitor and control operations.

Note: Administration, use, and retention of records concerning computer and information security should comply with applicable provisions of G.S. 132-6.1 on the confidentiality of records regarding "hardware or software security, passwords, or security standards, procedures, processes, configurations, software, and codes." (G.S. 132-6.1 (c))

ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.01 	AUDITS: IT SYSTEMS Records documenting user actions affecting the contents of monitored systems. Also includes fixity checks and other periodic tests of data validity.	a) Destroy in office 1 year after superseded or obsolete fixity check documentation. b) Destroy in office remaining records after disposition of record.*	Confidentiality: G.S. 132-6.1(c)
5.02	COMPUTER AND NETWORK USAGE RECORDS Records documenting usage of electronic devices and networks. Includes login files, system usage files, individual program usage files, and records of use of the Internet by employees.	Destroy in office after 1 year.	
5.03	DATA DOCUMENTATION RECORDS Records concerning data in automated systems. Includes data element dictionary, file layout, code book or table, entity relationships tables, and other records related to the structure, management, and organization of data.	Destroy in office 3 years after system is discontinued and/or replaced.	



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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.04	DATA MIGRATION RECORDS Technical records documenting data migrations. <i>Note: The data itself is subject to the disposition instructions indicated for its relevant records series; these are merely records about migrating said data.</i>	Destroy in office 1 year after completion of data migration.	
5.05	DATA WAREHOUSES Federated data gathered by the agency from other sources for the purposes of comparison and distribution. SEE ALSO: Collected Data (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office when superseded or obsolete.	Maintain confidentiality consistent with any restrictions placed on the data provider.
5.06	DIGITIZATION AND SCANNING RECORDS Records concerning data entry and imaging operations. Includes quality control records. See also REQUEST FOR DISPOSAL OF ORIGINAL RECORDS DUPLICATED BY ELECTRONIC MEANS , page A-21.	Destroy in office 10 days after digitization. <i>Note: The digital surrogate becomes the record copy and must be retained according to the disposition instructions for that record type.</i>	
5.07	 ELECTRONIC RECORDS POLICIES AND PROCEDURES Includes procedural manuals as well as an Electronic Records and Imaging Policy and a Security Backup Policy.	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.7(b) G.S. 132-6.1(c)


* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.08	INFORMATION TECHNOLOGY ASSISTANCE RECORDS Records documenting troubleshooting and problem-solving assistance provided by agency information systems personnel to users of the systems. Includes help desk assistance requests, resolution records, and related documentation.	Destroy in office 1 year after work is completed.	
5.09 	NETWORK AND SYSTEM SECURITY RECORDS Records documenting cybersecurity efforts. Includes records concerning firewalls, anti-virus programs, intruder scanning logs, and other related records.	a) Destroy in office finalized cyber incident reports 5 years after resolution. b) Destroy in office after 2 years records documenting incidents involving unauthorized attempted entry or probes on data processing systems, IT systems, telecommunications networks, and electronic security systems. c) Destroy in office after 1 year records concerning firewalls, anti-virus programs, and other related records.	Confidentiality: G.S. 132-6.1(c)
5.10 	NETWORK DIAGRAMS Records documenting the logical and physical relationships of network components for purposes of organization, deployment, troubleshooting, monitoring of access, and management of day-to-day operations.	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-6.1(c)

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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.11	PROJECT DOCUMENTATION Records created to design, develop, control, or monitor a specific project or group of IT projects. Includes statements of work, assessments, maintenance agreements, and testing records. SEE ALSO: Projects (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently records with historical value. b) Destroy in office remaining records 3 years after completion of project.	
5.12	SOFTWARE LICENSE AND COPYRIGHT PROVISIONS RECORDS Records documenting compliance with agency software license and copyright provisions. Includes software licenses, correspondence (including e-mail), and related documentation.	Destroy in office 1 year after software is superseded or obsolete.	
5.13	SYSTEM ACCESS RECORDS Records documenting access requests and authorizations, system access logs, and other related records.	Destroy in office 1 year after superseded or obsolete.	
5.14	 SYSTEM DOCUMENTATION RECORDS Records documenting operating systems, application programs, structure and form of datasets, system structure, and system-to-system communication. Includes system overviews, dataset inventories, server name, IP address, purpose of the system, vendor-supplied documentation, installed software, and current source code.	Destroy in office 3 years after superseded or obsolete.	Confidentiality: G.S. 132-1.1(g) G.S. 132-6.1(c)

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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.15	SYSTEM MAINTENANCE RECORDS: HARDWARE REPAIR OR SERVICE Records documenting inspections, maintenance, and repairs of agency computer systems that are owned or leased. Includes computer equipment inventories and service records. SEE ALSO: Equipment and Vehicle Maintenance, Repair, and Inspection Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office records documenting routine inspections and maintenance of equipment after 1 year. b) Destroy records documenting all other equipment maintenance and repairs upon the final disposition of the equipment.	
5.16	SYSTEM MAINTENANCE RECORDS: RECORDS BACKUPS Records documenting regular or essential system backups. Includes backup tape inventories, relevant correspondence (including e-mail), and related documentation. See also Security Backup Files as Public Records in North Carolina: Guidelines for the Recycling, Destruction, Erasure, and Re-use of Security Backup Files , available on the State Archives of North Carolina website.	Destroy in office in accordance with your office's established, regular backup plan and procedures.± Agency Policy: Destroy in office after <u>1 year</u>	
5.17	TECHNICAL PROGRAM DOCUMENTATION Records concerning program code, program flowcharts, program maintenance logs, systems change notices, and other related records that document modifications to computer programs.	Destroy in office 1 year after superseded or obsolete.	

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ITEM #	STANDARD 5: INFORMATION TECHNOLOGY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
5.18	VOICE OVER INTERNET PROTOCOL (VoIP) RECORDS Records concerning line registrations, calls logs, and voicemail records.	a) Destroy in office records concerning line registration when superseded or obsolete. b) Destroy in office call logs after 1 year. c) Destroy in office voicemail records after 30 days.	
5.19	WEB MANAGEMENT AND OPERATIONS RECORDS: STRUCTURE Site maps that show the directory structure into which content pages are organized, and commercial, off-the-shelf software configuration or content management system files used to operate the site and establish its look and feel. Includes server environment configuration specifications. SEE ALSO: Website (Electronic) (STANDARD 7: PUBLIC RELATIONS RECORDS).	Destroy in office when superseded or obsolete.	

5: IT

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

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STANDARD 6: LEGAL RECORDS

Official documentation created or accumulated to substantiate the rights, obligations, or interests of the agency or their individual employees or clients. Please note the confidentiality that G.S. 132-1.1(a) confers to communications by legal counsel expires three years after receipt of such communication.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.01	AFFIDAVITS OF PUBLICATION Proof of publication provided by newspapers regarding publication of ordinances, public hearings, bid solicitations, payment of bills, public sales, etc. SEE ALSO: Public Bodies: Meeting Notices (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently if record provides sole evidence of publication. b) Destroy in office remaining records after 3 years.*	Authority: G.S. 1-600
6.02	ANNEXATION RECORDS Records concerning annexation of property into the city. Includes petitions, reports, correspondence (including e-mail), maps, ordinances, and public hearings.	a) Destroy in office withdrawn petitions after 1 year. b) Retain remaining records in office permanently. <i>Retention Note: Annexation maps and ordinances must be filed with the County Register of Deeds office and the office of the Secretary of State (G.S. 160A-29, G.S. 160A-58.61 and G.S. 160A-58.90). A map must also be filed with the county board of elections (G.S. 163-288.1).</i>	
6.03	AUTHENTICATIONS Certificates of authentication issued by the agency.	Retain in office permanently.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.04	CIVIL RIGHTS CASE RECORDS Records concerning discrimination complaints by employees or former employees and employee requests for reasonable accommodation. Includes equal opportunity (EO) complaints. SEE ALSO: Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Personnel Records (Official Copy) (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Destroy in office requests for reasonable accommodation 2 years after they become obsolete. b) Destroy in office discrimination complaints 1 year after final disposition of the charge or the action.* <i>Retention Note: 29 CFR 1602.14 defines final disposition of the charge or the action as "the date of expiration of the statutory period within which the aggrieved person may bring an action in a U.S. District Court or, where an action is brought against an employer either by the aggrieved person, the Commission, or by the Attorney General, the date on which such litigation is terminated."</i>	Retention: 29 CFR 1602.14 29 CFR 1602.31

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.05	CIVIL RIGHTS RECORDS Records concerning documentation of personnel policies and procedures to comply with the Age Discrimination in Employment Act (ADEA), the Americans with Disabilities Act (ADA), the Equal Pay Act, the Genetic Information Nondiscrimination Act (GINA), Section 504 of the 1973 Rehabilitation Act, and the 1964 Civil Rights Act. Includes reports required by the Equal Employment Opportunity (EEO) Commission and affirmative action plans. SEE ALSO: Civil Rights Case Records (above), Constituent Comments, Complaints, Petitions, and Service Requests (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Policies and Procedures (Personnel) (STANDARD 4: HUMAN RESOURCES RECORDS).	Destroy in office 3 years after superseded or obsolete.	Authority: 29 CFR 1602.1 29 CFR 1602.7 29 CFR 1608.4 Retention: 29 CFR 1602.30 29 CFR 1602.32 34 CFR 104.6(c)(2)
6.06	CONDEMNATION RECORDS Settled and pending condemnation cases. SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records.	Retain in office permanently.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.07	CONFLICT OF INTEREST AND CONFLICT OF COMMITMENT DISCLOSURE STATEMENTS Completed by the elected agency officials as well as designated staff members in order to disclose an official's status or ownership interests.	Destroy in office 1 year after completion of term or separation.	
6.08	CONTRACTS, LEASES, AND AGREEMENTS @ Contracts and agreements for construction, equipment, property, supplies, special programs, and projects. Includes franchise agreements, hold harmless agreements, good faith effort documentation, contractor compliance monitoring, leases, and memoranda of understanding. SEE ALSO: Software License and Copyright Provisions Records (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Retain in office contracts and agreements with historical value permanently. b) Destroy in office sealed contract records 10 years after expiration of contract.* c) Destroy in office all records related to capital improvement contracts and business associate agreements 6 years after completion, termination, or expiration.* d) Destroy in office records documenting restrictions and compliance with license and copyright provisions for products and services purchased by the agency 1 year after superseded or obsolete.* e) Destroy in office all other contracts and agreements 3 years after completion, termination, or expiration.*	Retention: G.S. 1-47(2) G.S. 1-50(a)(5) 45 CFR 164.316 G.S. 1-52
6.09	DECLARATORY RULINGS Records concerning declaratory rulings issued by the agency to interpret statutes or rules as applied to a specified set of facts.	Retain in office permanently.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.10	DELEGATION OF AUTHORITY RECORDS Records documenting delegations of power to authorize agency business. Includes signature authorities and powers of attorney.	Destroy in office 1 year after superseded or obsolete.	
6.11	EASEMENTS AND RIGHT-OF-WAY AGREEMENTS Granted to the agency. SEE ALSO: Accounts Payable (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) for disposition of financial records; LOCAL PROGRAM SCHEDULE, Excavation Permits and Right-of-Way Acquisition Working Records (STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS).	Destroy in office 10 years after expiration of agreement.	
6.12	ENCROACHMENTS Records concerning agreements granted by or to the agency. Also includes maps or drawings detailing construction plans attached to agreements.	a) Retain in office permanently records concerning agreements granted by outside entities to the agency. b) Destroy in office when superseded or obsolete records concerning agreements granted to utilities, businesses, and private residents to encroach upon agency property.	
6.13	EXPUNCTIONS Expunction orders received by local agencies.	Destroy in office when record is expunged.	

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@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.14	INVESTIGATION AND HEARING RECORDS Records concerning complaints, fraud allegations, contestments, grievances, and inquiries against individuals and other entities. Includes summaries, charges, reports, assessments and findings, hearing transcripts and evidence, decisions and sanctions, referrals, correspondence, and other related records.	Destroy in office 3 years after completion.*	
6.15	LAND OWNERSHIP RECORDS Includes deeds and titles.	Destroy in office 1 year after agency relinquishes ownership of land.*	
6.16	 LEGAL CORRESPONDENCE Correspondence (including e-mail) and related records concerning legal matters not related to specific legal cases or official opinions.	Destroy in office after 5 years. For information on handling e-mail, see ELECTRONIC RECORDS , page A-11.	Confidentiality: G.S. 132-1.1(a)
6.17	LEGAL OPINIONS Formal legal opinions written by counsel in response to requests concerning the governance and administration of the agency.	Retain in office permanently.	
6.18	 LEGAL REVIEW RECORDS Includes legal reviews of by-laws and charges to boards and commissions, conflicts of interest, and all other agency matters as requested. SEE ALSO: Legal Opinions (above).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records after expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a)

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.19 	LITIGATION CASE RECORDS Civil suits to which the agency is a party. Includes affidavits, agreements, appeals, bills, briefs, citations, commitments, complaints, discharges, motions, notices, pleas, releases, statements, testimony, verdicts, waivers, warrants, and writs.	a) Retain in office cases having precedential or historical value permanently. b) Destroy in office adjudicated cases 6 years after final disposition. c) Destroy in office non-adjudicated cases (out-of-court claims) 6 years after final disposition or expiration of relevant statute of limitations.	Confidentiality: G.S. 132-1.1(a) G.S. 132-1.9
6.20	OATHS OF OFFICE SEE ALSO: Public Bodies: Member Files (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Transfer official copy of oath of office to the municipal clerk or the county clerk to the board of commissioners or the clerk of the governing board for permanent retention. <i>Retention Note: The Clerk should present a copy of the oaths of elected officials to the Clerk of Superior Court for recording.</i>	Authority: G.S. 105-349 G.S. 153A-26 G.S. 160A-61 G.S. 160A-68 G.S. 160A-284 Retention: G.S. 7A-103(2)
6.21	PERMISSIONS Records conferring legal permission. Includes copyright permission requests and requests for permission to publish intellectual property or holdings of the agency. Also includes copyrights, patents, and trademarks held by the agency.	a) Retain in office permanently records conferring perpetual legal permission as well as records documenting copyrights, patents, and trademarks held by the agency. b) Destroy in office 3 years after expiration records concerning one-time copyright permissions granted by the agency.	

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ITEM #	STANDARD 6: LEGAL RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
6.22	PRE-TRIAL RELEASE PROGRAM RECORDS Records documenting supervision for defendants who do not pose a risk to the community as they await trial.	Destroy in office 3 years after trial.	
6.23	RELEASE FORMS Records documenting consent and waiving the individual's right to hold the agency responsible for injuries or damages occurring while voluntarily participating in events or activities.	Destroy in office 5 years after termination of release/waiver.	
6.24	SETTLEMENTS Records concerning pre-litigation or informal settlements.	Destroy in office 10 years after expiration.	Authority: G.S. 132-1.3
6.25	VEHICLE TITLES Titles of agency owned vehicles.	Dispose of in accordance with Division of Motor Vehicles procedures for title transfer upon disposition of vehicle.	Authority: G.S. 20-72

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STANDARD 7: PUBLIC RELATIONS RECORDS

Official records and materials created and accumulated by internal public relations programs operated by the agency.

ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.01	AGENCY PUBLICATIONS Publications created at agency expense. Also includes correspondence and other related records regarding the design and creation of agency publications.	a) Retain in office records with historical value permanently. b) Destroy publications management records after 5 years. c) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u>	
7.02	AUDIO-VISUAL RECORDINGS @ Recordings (including digital) and films produced by or for the agency. This does not include recordings of public meetings or security videos. SEE ALSO: Public Bodies: Audio and Video Recordings of Meetings (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS), Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u>	
7.03	COMMUNITY AWARDS @ Records concerning awards by the agency recognizing community contributions.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u>	

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ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.04	CONFERENCES AND WORKSHOPS @ Records concerning conferences and workshops conducted by agency employees. Includes slides, charts, transparencies, handouts, and other related records used in presentations. SEE ALSO: Training and Educational Records (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
7.05	EDUCATIONAL MATERIALS Materials produced for usage by teachers or tour groups. Includes lesson plans, activities, and other related records.	Destroy in office when superseded or obsolete.	
7.06	FUND DRIVE AND EVENT RECORDS Records documenting the promotion and organization of fund drives and other special events in which the agency participated. Includes records concerning solicitations requesting and donations providing money or in-kind donations for agency programs. Also includes invitations, registration materials, agendas, handouts, presentations, and programs. SEE ALSO: Donations and Solicitations (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	

7: PR

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ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.07	INVITATIONS Invitations sent and received concerning agency and external functions.	Destroy in office after event occurs.	
7.08	MEDIA FILE Reference copies of newspaper, magazine, and other media clippings concerning the agency, agency officials, and other topics of interest.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>2 years</u>	
7.09	POPULAR ANNUAL FINANCE REPORT Comprehensive annual financial report (CAFR)	a) Retain records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
7.10	PUBLIC HEARINGS Includes agendas, minutes, notices, speaker sign-up sheets, and similar documentation. SEE ALSO: Public Bodies: Minutes (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office minutes permanently. b) Destroy in office remaining records after 1 year.	

7: PR

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ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.11	PUBLIC RECORDS REQUESTS Formal requests submitted by persons seeking access to agency records along with documentation of agency response.	Destroy in office 2 years after resolution.* <i>Note: These disposition instructions apply only to the request, internal agency records related to searching for and preparing responsive records, and communication of response; the documents that are responsive to public records requests should be handled according to their respective disposition instructions. However, if the agency also retains separate copies of the documents that are responsive to public records requests, they may also be destroyed 2 years after completion of the request.</i>	
7.12	PUBLICITY RECORDS @ Records concerning overall public relations of agency. Includes advertisements, announcements, correspondence (including e-mail), photographic materials, news and press releases, and other related records.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.*	
7.13	SOCIAL MEDIA SEE ALSO: Website (Electronic) (below).	See APPENDIX (page A-12) for guidance in handling social media.	
7.14	SPEECHES Speeches made by agency officials.	a) Retain in office records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after _____	

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ITEM #	STANDARD 7: PUBLIC RELATIONS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
7.15	WEBSITE (ELECTRONIC) Records created and maintained in paper and electronic formats concerning the creation and maintenance of the agency's presence on the World Wide Web. Includes correspondence (including e-mail), procedures, instructions, website designs, HTML/XHTML, or other web-based file formats, and other related records. SEE ALSO: Web Management and Operations Records: Structure (STANDARD 5: INFORMATION TECHNOLOGY RECORDS).	a) Capture website annually or whenever a major revision in design and/or content has taken place, whichever occurs first. Retain captured content in office permanently. Can be maintained as website snapshots or via Web crawler. b) Destroy in office remaining records when superseded or obsolete.	

7: PR

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STANDARD 8: RISK MANAGEMENT RECORDS


Official records created and accumulated to manage risks in the agency.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.01	ACCIDENT/INCIDENT REPORTS (CUSTOMER AND EMPLOYEE) SEE ALSO: Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS).	a) Transfer records resulting in workers' compensation to Workers' Compensation Program Claims (STANDARD 4: HUMAN RESOURCES RECORDS). b) Destroy in office remaining employee claims 3 years after settlement or denial of claim.* c) Destroy in office adult non-employee reports 3 years after settlement or denial of claim.* d) Destroy in office reports that do not result in claims or official action after 3 years. e) Destroy in office reports of minors after minor has reached age of 21.	
8.02	DECLARATIONS AND TERMINATIONS OF STATES OF EMERGENCY	Retain in office permanently.	Authority: G.S. 166A-19.22

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ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.03 	DISASTER AND EMERGENCY MANAGEMENT PLANS @ Records concerning preparedness, evacuations, and operations in the event of a disaster (natural, accidental, or malicious). Includes background surveys, studies, reports, and records concerning the process of notifying personnel in the event of an emergency. Also includes Continuity of Operations Plans (COOP) and Business Continuity Plans (BCP).	Destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-1.7
8.04	DISASTER RECOVERY Administrative records documenting and recovery efforts for emergencies of a short duration as well as disasters inflicting widespread destruction and having long-term consequences for the agency. Includes documents coordinating activities with federal, state, and local emergency management, incident reports, inventories, and disaster relief allocations.	a) Retain in office permanently records documenting major agency disaster recovery efforts and records evaluating emergency response and efficacy. b) Destroy in office after 3 years records concerning minor or routine agency recovery operations that are managed with minimal disruption to normal operations.	
8.05	EMERGENCY DRILLS AND EQUIPMENT RECORDS Includes test records for fire suppression, defibrillator, respirator fit, and other emergency equipment. Also includes records concerning agency emergency and fire drills.	Destroy in office when superseded or obsolete.	
8.06	EMERGENCY NOTIFICATIONS Notifications and alerts sent to residents by Emergency Management or other agency staff regarding a current emergency.	Destroy in office after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.07	EMPLOYEE SECURITY RECORDS Records concerning the issuance of keys, identification cards, parking assignments, passes, etc., to employees. SEE ALSO: Office and Property Security Records (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy in office when superseded or obsolete.	
8.08	FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS Records concerning agency safety measures. Includes reports, logs, and other related records documenting inspections of agency facilities.	a) Destroy in office inspection reports after 7 years. b) Destroy in office safety audits after 3 years. c) Destroy in office remaining records when superseded or obsolete.	
8.09	FIXED NUCLEAR FACILITIES PLANS FILE Records concerning emergency plans for county fixed nuclear facilities.	Destroy in office when superseded or obsolete.	
8.10	FUEL OIL STORAGE TANK RECORDS	Destroy in office closure records 3 years after completion of permanent closure.	Authority: 40 CFR 280.34 Retention: 40 CFR 280.74

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.11	<p>HAZARDOUS MATERIALS MANAGEMENT</p> <p>Records documenting agency efforts to prevent and mitigate exposure to hazardous materials. Includes risk assessments, management plans, and abatement/removal records.</p> <p>SEE ALSO: Safety Data Sheets (below).</p> <p><i>Note: Title 10A of the NC Administrative Code provides guidelines about the records requirements for persons who receive, possess, use, transfer, own or acquire any sources of radiation within the State of North Carolina.</i></p>	<p>a) Retain in office permanently records documenting hazardous waste disposal sites on agency property and documenting the use of pathogens and biological toxins (select agents) at the agency.</p> <p>b) Destroy in office asbestos records 1 year after building is demolished. <i>(Note: If building is sold, transfer records to new owner.)</i></p> <p>c) Destroy in office after 5 years records concerning the receipt, maintenance, and disposal of radioactive materials.</p> <p>d) Destroy in office 3 years after superseded or obsolete records concerning hazard mitigation plans.</p> <p>e) Destroy in office records documenting environmental and hazardous waste remediation projects 5 years after project completion.</p> <p>f) Destroy in office remaining records after 30 years.</p>	<p>Retention: 29 CFR 1910.1001(j)(3)(ii)</p>

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.12	INSURANCE POLICIES Records concerning automobile, theft, fire, and all other insurance policies purchased by agency. Also includes insurance audits, claims reports, surveys, endorsements, certificates of insurance, and waivers.	a) Destroy in office records concerning automobile and other liability insurance policies 10 years after superseded or obsolete.* b) Destroy in office certificates of insurance after 1 year. c) Destroy in office self-insurer certifications 6 years from date of termination of policy or settlement of all claims. d) Destroy in office remaining records after 1 year after superseded or obsolete.	
8.13	LOSS CONTROL INSPECTION REPORTS Self-inspections to identify potential liabilities or hazards that may exist in agency owned buildings or property.	Destroy in office when superseded or obsolete.	
8.14	LOST, STOLEN, OR DAMAGED PROPERTY REPORTS Includes reports of property lost or stolen at agency. Also includes reports and employee narratives of vandalism to agency property.	Destroy in office after 2 years.*	
8.15	NATIONAL FLOOD INSURANCE PROGRAM RECORDS Records concerning the participation of a local government agency in FEMA's National Flood Insurance Program (NFIP). Includes floodplain management ordinances, maps, and other related records.	a) Retain in office permanently floodplain management ordinances. b) Destroy in office copies of flood insurance rate maps, elevation certificates, and elevation information when superseded or obsolete.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

ITEM #	STANDARD 8: RISK MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
8.16	OCCUPATIONAL SAFETY AND HEALTH ADMINISTRATION (OSHA) Records concerning injury or illness, extent and outcomes, summary totals for calendar year, and OSHA forms. Includes ergonomic assessments for employees.	Destroy in office after 5 years.	Retention: 29 CFR 1904.33 29 CFR 1904.44
8.17	SAFETY DATA SHEETS Forms supplied to agencies from manufacturers and distributors of hazardous materials for materials held by the agency.	Destroy in office 30 years after materials have been disposed of according to manufacturer's instructions. <i>Retention Note: A data sheet for a mixture may be discarded if the new data sheet includes the same hazardous chemicals as the original formulation. If the formulation is different, both data sheets must be retained for 30 years. Data sheets may also be discarded if some other record identifying the substances used, where they were used, and when they were used is retained the required 30-year period.</i>	Retention: 29 CFR 1910.1020(d)(1)(ii)(B)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

@ In some cases, more specific record retention and disposition requirements can be found in the relevant program schedule. See the appendix for pointers to such records series.

STANDARD 9: WORKFORCE DEVELOPMENT RECORDS

Official records created and accumulated by the agency to manage workforce development programs. Relevant legislation includes the Comprehensive Employment and Training Act, the Job Training and Partnership Act, the Workforce Investment Act, and the Workforce Innovation and Opportunity Act.

ITEM #	STANDARD 9: WORKFORCE DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
9.01	AUDIT/AUDIT RESOLUTIONS Records concerning reports from financial and compliance audits conducted on Workforce Investment Act programs in accordance with OMB Circular A-133. Includes audit reports and correspondence concerning audits and audit resolutions for the local area. Also includes federal and state audits.	Destroy in office after 3 years.	Authority: OMB Circular A-133 29 CFR 97.26
9.02	LOCAL AREA JOB TRAINING PLAN RECORDS Records concerning the local board's bid process for contracting workforce development programs.	Destroy in office when superseded or obsolete.	Authority: 20 CFR 652.8
9.03	PARTICIPANT RECORDS Records concerning applicants, registrants, eligible applicants/registrants, participants, terminees, and employees who submit requests for services of the Dislocated Workers Program and Workforce Investment Act programs. Includes applications, client history, Employability Development Plans, program referral, monitoring notes, pay authorizations, release forms, and Workforce Investment Act follow-up questionnaires.	Destroy in office 3 years after close of audit/final year expenditure.*	Authority: 20 CFR 652.8

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See **AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION**, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this “records retention and disposition schedule”?

- A.** This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

- A.** This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.
-

Q. Am I required to have all the records listed on this schedule?

- A.** No, this is not a list of records you must have in your office.
-

Q. What is “reference value”?

- A.** Items containing “reference value” in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase “destroy in office when reference value ends” in the disposition instructions.
-

Q. Do the standards correspond to the organizational structure of my agency?

- A.** Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule’s organization is to provide an easy reference guide for the records created in your agency.
-

Q. What if I cannot find some of my records on this schedule?

- A.** Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-19) can be used for such requests.
-

Q. What are public records?

- A.** The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:
- “Public record” or “public records” shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or characteristics, made or received pursuant to law or ordinance in connection with the

transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (State or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the State or of any county, unit, special district or other political subdivision of government.

Q. *Is any person allowed to see my records?*

- A.** Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

“Every custodian of public records shall permit any record in the custodian’s custody to be inspected and examined at ± times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. ... No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request.”

Q. *What about my confidential records?*

- A.** Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.

Q. *Am I required to make available to the public copies of drafts that have not been approved?*

- A.** Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is “finished” or not.

Q. *What do I do with permanent records?*

- A.** Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of “a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests of persons**” (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.
- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records

available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.

- Adoptions, marriages, and divorces document changes in familial relationships. Though adoptions are confidential (not available for public inspection), they document changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation>) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

- A.** Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its constituents. Two criteria for determining historical value are inherent interest and extraordinary documentation:
- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
 - Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of residents and organizations?
- Do they have a long-term impact on residents and organizations?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

- A.** Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.
-

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

- A.** We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on page A-22. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. May I store our unused records in the basement, attic, shed, etc.?

- A.** Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?

- A.** Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. Aren't all our old records at the State Archives of North Carolina?

- A.** Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. I found some really old records. What should I do with them?

- A.** Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. Can I give my old records to the historical society or public library?

- A.** Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. Whom can I call with questions?

- A.** If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See Audits: Performance (STANDARD 1: ADMINISTRATIVE AND MANAGEMENT RECORDS) and Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”³

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called “transitory records.” The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the *General Records Schedule: Local Government Agencies*, their office’s Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, “while you were out” slips, memory aids, etc.?

- A.** Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the *General Records Schedule: Local Government Agencies* or your office’s Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

- A.** Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

³ Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

- A.** If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: <https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-signatures>

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

- A.** Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are “Retain in office permanently,” which means that those records must be kept in your offices forever.
-

Q. How do I destroy records?

- A.** After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:
- 1) burned, unless prohibited by local ordinance;
 - 2) shredded, or torn so as to destroy the record content of the documents or material concerned;
 - 3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
 - 4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

— N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency’s approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

- A.** Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a Request for Disposal of Unscheduled Records (page A-20) if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. Am I required to tell anyone about the destructions?

- A.** We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, <https://archives.ncdcr.gov/government/rm-tools>).



Destructions Log

County/Municipality					
Division		Section		Branch	
Location(s) of Records					

[illegible]

ELECTRONIC RECORDS: E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

- A.** E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

*From the Department of Cultural Resources E-Mail Policy (Revised July 2009),
available at the State Archives of North Carolina website*

Other publications (available online at the [State Archives of North Carolina website](#)) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

- A.** We do not recommend printing e-mail for preservation purposes. Important metadata is lost when e-mail is printed.
-

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

- A.** The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records “made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions” are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. We have an imaging system. Are we required to keep the paper?

- A.** You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging>). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's [Human-Readable Preservation Duplicate Policy](#) (N.C. Gen. Stat. § 132-8.2):

Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. Computer storage is cheap. Can I just keep my computer records permanently?

- A.** The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?

- A.** There are numerous documents available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines>). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years (see Leave Records, STANDARD 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

- A.** Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

- A.** The following types of geospatial records have been designated as having archival value:
- Parcel data
 - Street centerline data
 - Corporate limits data
 - Extraterritorial jurisdiction data
 - Zoning data, address points
 - Orthophotography (imagery)
 - Utilities
 - Emergency/E-911 themes

For more information, see **STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS**.

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

- A.** Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

- A.** Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at <https://it.nc.gov/about/boards-commissions/gicc>.

Q. *Who should be responsible for creation and long-term storage of archived data?*

- A.** The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

- A.** Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

- A.** The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.
-

Q. How do I start the process of backing up the above listed records?

- A.** We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the [State Archives of North Carolina website](#)) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "[Transfer of Minutes in Digital Formats for Microfilming](#)" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

- A.** Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. Can I obtain digital copies of the security preservation records?

- A.** Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

- A.** Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

- A.** We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.
-

Q. What can I do to prepare for an emergency?

- A.** We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.
-

Q. What are essential records?

- A.** Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:
- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
 - **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as “rights-and-interests” records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

- A.** We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:
- Managing public records in North Carolina
 - Disaster preparedness and recovery
 - Confidentiality
 - Organizing paper and digital files
 - Digital communications

Q. Will you design a workshop especially for our office?

- A.** Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

- A.** No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public. To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (<https://archives.ncdcr.gov/government/local/analysts>).

Q. Is there a fee for workshops?

- A.** Not at this time.

Q. Are the workshops available in an online format?

- A.** We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see <https://archives.ncdcr.gov/government/training/webinars>. You can also find several online tutorials available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/training/online-tutorials-and-resources>).



Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

☐ Add a new item

☐ Delete an existing item

☐ Change a retention period

Standard Number _____ Page _____ Item Number _____

Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records:

Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date



Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and email

Mailing Address

In accordance with the provisions of N.C. Gen. Stat. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date

Concurred by:

Signature

Assistant Records Administrator
State Archives of North Carolina

Date



Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:		Date (MM-DD-YYYY):
Phone (area code):	Email:	
County/Municipality:	Office:	
Mailing address:		

Records Series Title A group of records as listed in records retention schedule	Description of Records Specific records as referred to in-office	Inclusive Dates (1987-1989; 2005-present)	Approx. Volume of Records (e.g. "1 file cabinet," "5 boxes")	Retention Period As listed in records retention schedule

Requested by: _____
Signature Title Date

Approved by: _____
Signature Requestor's Supervisor Date

Concurred by: _____
Signature Assistant Records Administrator Date
State Archives of North Carolina



File Plan

[illegible]

Related Records Series Found in Local Agency Program Schedules

In some limited cases, records series with similar names and/or functions that are created and maintained by local government entities have not been superseded by the *General Records Schedule: Local Government Agencies*. These records series are described as unique records series in one of the local program retention schedules issued separately by DNCR for use by specific local agencies. This duplication occurs when records with similar names and/or functions have different retention guidance due to statutory, legal, evidentiary, or fiscal requirements. An example of this is the accounts receivable records series. In the *General Records Schedule*, the Accounts Receivable records series has a disposition instruction of “Destroy in office 3 years after collection.” In the *Local Health Departments Schedule*, the Accounts Receivable: Clinical Services records series also includes the disposition instruction, “Destroy records supporting the expenditure of federal funds passed through NC DHHS on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions.” In both cases, the records series documents the money received by the local agency, however, the retention requirements for the Accounts Receivable: Clinical Services differ due to specific retention requirements concerning the management and dispersal of grant funds.

The purpose of this table is to provide a source for determining if the general records series item listed in the *General Records Schedule: Local Government Agencies* covers the function and/or retention requirements associated with the records created by your agency or if a specific program schedule applies. This table provides pointers to the relevant records series that can be found in one or more of the local agency program schedules.

Here’s how to use the table:

- The records series found in the left-most column are listed and described in the *General Records Schedule: Local Government Agencies* and appear in this schedule with a @ beside them.

ACCOUNTS RECEIVABLE @

Records concerning receivables owed and collected. Includes billing statements, records of payment received, remittances, subsidiary registers, overpayment or refund records, deposits, fines and fees assessed, and collection of past due accounts. Also includes records concerning accounts sent to NC Debt Setoff Program for collection.

- The middle column lists similar records series from one or more of the schedules that have been issued separately for use by specific local agencies.
- The right-hand column lists the local agency program schedule that includes the records series listed in the middle column. The agencies represented in the right column include, but are not limited to, local health departments, Registers of Deeds, Sheriff’s offices, local social services agencies, and tax offices.

If you need further information, please contact a Records Management Analyst.

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable	Accounts Receivable: Clinical Services	Local Health Departments Schedule

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Accounts Receivable (cont.)	Accounts Receivable – Client Services	LME Schedule LME-MCO Schedule
Administrative Directives, Regulations, and Rules	State Board of Elections Numbered Memos	County Board of Elections Schedule
Audits: Financial	Clinical Record Audits	Local Health Departments Schedule
	Clinical Record Audits	LME Schedule
	Clinical Record Audits	LME-MCO Schedule
Audits: Performance	Pharmacy Audit Records	Local Health Departments Schedule
Blueprints and Specifications	Blueprints and Specifications Project Records – Core	Local Government Agencies Program Schedule
Community Awards	Student Awards and Honors Records	Local Public School Unit Schedule
Conferences and Workshops	Health Promotion Training Records	Local Health Departments Schedule
Constituent Comments, Complaints, Petitions, and Service Requests	Animal Complaint Records Illegal Dumping File Violations: Building and Housing Violations: Solid Waste Management Complaints (Law Enforcement)	Local Government Agencies Program Schedule
	Complaints	County Sheriff's Office
	Complaints: All Service Areas	County Social Services Agencies Schedule
	Animal Complaints	Local Health Departments Schedule
	Complaints File	LME Schedule
	Complaints File	LME-MCO Schedule
Contracts, Leases, and Agreements	School Health Provider Contracts	Local Health Departments Schedule
	Petroleum Leases Register	Register of Deeds Schedule
Disaster and Emergency Management Plans	Public Health Emergency Preparedness and Response Records	Local Health Departments Schedule
Equipment and Vehicle Maintenance, Repair, and Inspection Records	Equipment and Instrument Maintenance and Repair File	Local Health Departments Schedule
	Autopsy and Surgical Pathology: Instrument Maintenance Records	Public Hospitals Schedule
	Clinical Laboratory Records: Instrument Maintenance Records	
	Cytology Records: Instrument Maintenance Records File	
	Instrument Maintenance File	

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Grants Grants: Financial	CDBG Records CDBG Outstanding Loan Balances CDBG Subject to Reversion of Assets Provisions or Change of Use of Real Property Continuum of Care Records Emergency Solutions Grants Records Home Investment Partnerships Program Records Housing Assistance for Persons with Disabilities Housing Opportunities for Persons with AIDS Records	Local Government Agencies Program Schedule
Indices	Board of Adjustment Case Files and Indexes Conditional Use Permit Records and Index Rezoning Records and Indexes	Local Government Agencies Program Schedule
	Master Client Identification File (Master Client Index)	LME Schedule LME-MCO Schedule
	Master Patient Index	Public Hospital Schedule
	Armed Forces Discharges and Index Chattel Mortgages and Index Corporations (Incorporations) Records and Index Deeds, Record of and Index Deeds of Trust (Mortgages), Record of and Index Highway Right-of-Way Maps and Index Land Sold for Taxes and Index Merchant Returns and Index Mineral Rights Records and Index Notaries Public Records and Index Official Record Book and Index Partnerships and Assumed Names Records and Index Plats, Maps, and Index Registration of Titles (Torrens Act) and Index Surveys, Record of and Index Timber Marks and Index Vital Records: Births and Index Vital Records: Deaths and Index Vital Records: Delayed Births and Index	Register of Deeds Schedule
Inventories	Drug Inventories	Local Health Departments Schedule

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Inventories (cont.)	Drugs Inventories	Public Hospitals Schedule
Maps: All Other	Utilities: Maps (Utility Installations & Distributions)	Local Government Agencies Program Schedule
	Plats, Maps, and Index	Register of Deeds Schedule
	Maps (Utility Installations and Distributions)	Water and Sewer Authorities and Sanitary Districts Schedule
Policies and Procedures	Clinical Policies and Procedures Laboratory Procedures Manual Behavioral Health Program Policy and Procedure Records	Local Health Departments Schedule
	Laboratory Procedures/Protocol File	Public Hospitals Schedule
Poll List/Registration List/Roster/Authorization to Vote (ATV)	Poll List/Registration List/Roster/Authorization to Vote (ATV)	County Board of Elections Schedule
Projects	Appraisal Project File Project Records – Cancelled Project Records – Core Project Records – Engineering & Compliance	Local Government Agencies Program Schedule
	State Board of Elections Correspondence and Reports	County Board of Elections Schedule
	Water and Wastewater System Project Records	Waste and Sewer Authorities and Sanitary Districts Schedule
Publicity Records	Student Publicity Records	Local Public School Unit Schedule
Rate and Fee Schedules	Fee Schedules	Local Health Departments Schedule
	Fee Schedules	LME Schedule
	Fee Schedules	LME-MCO Schedule
Recordings: Customer Call Center Recordings Audio-Visual Recordings	Traffic Video Recordings and Data Law Enforcement Audio and Video Recordings Communication Records Electronic Recordings of Interrogations	Local Government Agencies Program Schedule
	Audio and Video Recordings Communication Records Electronic Recordings of Interrogations (Juvenile and Homicide)	County Sheriff's Office

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies	Land Development and Planning Studies and Reports Ambulance Call Reports/Patient Care Reports North Carolina Fire Incident Report Pool Records Environmental: Customer Usage Records Environmental: Discharge Monitoring Reports Environmental: Landfill Monitoring Reports Environmental: Reports Submitted to U.S. Environmental Protection Agency Utilities: Daily Water and Wastewater Facility Operators Logs Utilities: Service Interruption Records Utilities: Wastewater Maintenance Operation Reports Water Quality: Pretreatment Program Records Water Quality: Public Water Sanitary Survey Records Appraisal Reports Traffic Analysis Project Records – Core Project Records – Engineering & Compliance Alarm Call Reports Arrest Reports Chemical Analysis Records Crime Analysis Records Detention Facility Incident Reports Detention Facility Physical Force Records Incident Response Reports Inmate Death Reports Laboratory Case Records Multiple Firearms Sales Reports Multiple Firearms Sales Reports Destruction Records Traffic Accident Reports	Local Government Agencies Program Schedule
(continued on following page)		

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies (cont.)	Daily Store Reports Monthly Law Enforcement Activity Reports Monthly Operating Report to Board Receiving Report Sales Reports Stock Difference Reports Weekly Warehouse Reports	Alcoholic Beverage Control Boards Schedule
	Campaign Contribution and Expenditure Reports Ballot Reports State Board of Elections Correspondence and Reports Voter Registration Lists and Reports	County Board of Elections Schedule
	Alarm Call Reports Arrest Reports Detention Facility Incident Reports DWI Reports Incident Response Reports Inmate Death Reports Traffic Accident Reports	County Sheriff's Office
	Program Time and Activity Reports Medicare Disbursement Reports Communicable Disease Reports Test Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Local Health Departments Schedule
	Medicare Disbursement Reports	LME Schedule LME-MCO Schedule
	Admission/Discharge/Transfer Reports Communicable Disease Reports Call-In Reports Adverse Drug Reaction Reports Intravenous Hood Performance Reports Medication Storage Inspection Reports	Public Hospitals Schedule
(continued on following page)		

Local General Schedule Records Series	Related Records Series	Local Program Schedule
Reports and Studies (cont.)	Certified Facility Operators Logs and Reports Discharge Monitoring Reports Periodic Inspection Reports of Industrial Facilities Wastewater Maintenance Operation Reports	Waste and Sewer Authorities and Sanitary Districts Schedule
Strategic Plan	Land Development and Planning Studies and Reports Parks Planning File Comprehensive Plan and Amendments Environmental: Comprehensive Solid Waste Management Plan and Amendments Planning File (Street Maintenance)	Local Government Agencies Program Schedule

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This change log notes all substantial changes from the 2019 to the 2021 version of the *General Records Schedule: Local Government Agencies*. For simplicity, wordsmithing, typographical corrections, pointers to other records series, and modifications to citations have not been tracked. Substantive changes are listed in the left-hand column. In the center column are the titles of new records series that have been added to the schedule. In the right-hand column are records series that have been discontinued because the records are no longer created or received by local government agencies (or in cases where these are listed in the same row as a series that was changed, these records have been combined into that broader records series). The index to the schedule also includes pointers where one series was subsumed into another.

Please note that what had been the Personnel Records standard (Standard 6) has been retitled as the Human Resources standard; alphabetization means this is now Standard 4 (and IT Records and Legal Records have been shifted to standards 5 and 6 respectively).

This updated schedule also includes in the appendix a section entitled “Related Records Series Found in Local Agency Program Schedules,” which identifies records series within the Local General Schedule (indicated with @) that have similar records series on local program schedules.

Changes	New Items	Discontinued Items
Standard 1: Administration and Management Records		
ACCREDITATION RECORDS Added to description outside evaluations of agency		
ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES Added description and modified disposition instructions		
AUDITS: PERFORMANCE Added disposition instructions for PCI attestation reports		
CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS Changed title from Citizen to Constituent; clarified that requests for reasonable accommodation included in this series are those from the general public; changed retention for all complaints to 1 year		

Changes	New Items	Discontinued Items
CONSTITUENT SURVEYS Changed title from Citizen to Constituent		
FACILITY MAINTENANCE, REPAIR, AND INSPECTION RECORDS Clarified this series also includes records related to agency-owned property as well as warranties		
GRANTS Added to description any required certifications and disclosures; specified disposition for grants funded by local appropriations		
	HISTORICAL DESIGNATIONS RECORDS	
LOGISTICS MATERIALS Added agency activities to the description and modified disposition instructions		
MISCELLANEOUS (NON-BUILDING) APPLICATIONS, LICENSES, AND PERMITS Added to description free government-issued business permits		
OFFICE AND PROPERTY SECURITY RECORDS Changed title from Office Security Records; added property to the description and added disposition instructions for recordings that may necessitate action by law enforcement		
	PHONE LOGS	

Changes	New Items	Discontinued Items
Inserted PUBLIC BODIES at beginning of series titles to group together: <ul style="list-style-type: none"> • Agenda and Meeting Packets (also added exhibits to description) • Applications for Appointment • Appointment Reports • Audio and Video Recordings of Meetings • Notices of Public Meetings (renamed Meeting Notices) • Governing and Advisory Body Member File (renamed Member Files) • Minutes of Public Bodies (renamed Minutes) 		
	PUBLIC BODIES: CORRESPONDENCE	
REBATE PROGRAM RECORDS Deleted Citizen from title		
REPORTS AND STUDIES Added a specific disposition for quarterly reports		
REQUESTS FOR PROPOSALS Specified inclusion of elements created by the agency (e.g., notices, evaluations)		
STAFF MEETINGS FILE Renamed from Minutes (Staff Meetings) and added additional materials relevant to internal meetings along with materials from external that had been listed in Agenda and Meeting Packets		
STRATEGIC PLAN Renamed from Comprehensive Plan, added mission statements to the description, and clarified disposition instructions		

Changes	New Items	Discontinued Items
Standard 2: Budget, Fiscal, and Payroll Records		
ACCOUNTS PAYABLE Modified disposition of reimbursements to reflect DES requirements		
ACCOUNTS RECEIVABLE Modified description to add records for debt setoff program		
BOND CLOSING RECORDS Increased retention requirement to mirror state requirements		
GRANTS: FINANCIAL Specified disposition for grants funded by local appropriations		
LONGEVITY PAY Increased retention to reflect DES requirements		
PAYROLL AND EARNINGS RECORDS Increased retention to reflect DES requirements; added employer contributions to description		
PAYROLL DEDUCTION RECORDS Added retirement deductions to description		
SHIFT PREMIUM PAY Increased retention to reflect DES requirements		
TAX FORMS Increased retention to reflect DES requirements		
TIME SHEETS, CARDS, AND ATTENDANCE RECORDS Increased retention to reflect DES requirements		
TRAVEL REIMBURSEMENTS Increased retention to reflect DES requirements		
Standard 3: Geographic Information System (GIS) Records		
MAPS: ALL OTHER Included paper maps in description		

Changes	New Items	Discontinued Items
Standard 4: Human Resources Records (previously Personnel Records)		
APPLICATIONS FOR EMPLOYMENT Added pointer in disposition to Seasonal and Contract Workers		
BENEFITS RECORDS Specified disposition for correspondence with providers		
		CERTIFICATION AND QUALIFICATION RECORDS Already covered by Training and Educational Records; Conferences and Workshops
HAZARDOUS MATERIALS TRAINING RECORDS Added to description documentation of loans of radioactive materials for training purposes		
MEDICAL RECORDS Clarified description to include records of employees, contractors, and volunteers; expanded description of health and physical examinations		
PERSONNEL RECORDS (OFFICIAL COPY) Clarified description to specify employees eligible for benefits		
POLICIES AND PROCEDURES (PERSONNEL) Added description; deleted disposition for non-internal records, which should be considered part of the Reference (Reading) File, and added disposition for HR administrative records (e.g., employee orientation materials)		

Changes	New Items	Discontinued Items
RETIREMENT RECORDS Clarified description; removed separate disposition for deferred compensation – those that are from retirement plans are covered in this item, and those that are for some sort of bonus should be treated as Payroll and Earnings Records		
TRAINING AND EDUCATIONAL RECORDS Added general training materials to description; added disposition for expired employee certifications/qualifications along with one for general training materials		
UNEMPLOYMENT COMPENSATION CLAIMS Increased retention to reflect DES requirements		
UNEMPLOYMENT COMPENSATION REPORTS Increased retention to reflect DES requirements		
Standard 5: IT Records		
Clarified retention for fixity check documentation		
Standard 6: Legal Records		
ANNEXATION RECORDS Specified disposition for withdrawn petitions		
CIVIL RIGHTS CASE RECORDS Specified disposition for employee requests for reasonable accommodations		
ENCROACHMENTS Changed description from citizens to residents		
	EXPUNCTIONS	
	INVESTIGATION AND HEARING RECORDS	
		REASONABLE ACCOMMODATIONS Already covered by Constituent Comments, Complaints, Petitions, and Service Requests
	SETTLEMENTS	

Changes	New Items	Discontinued Items
Standard 8: Risk Management Records		
DISASTER RECOVERY Clarified description and specified disposition for records evaluating the efficacy of recovery efforts		
	EMERGENCY NOTIFICATIONS Moved from the Emergency Services standard of the old County Management schedule	
FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS Added Environmental to the series title and added specific dispositions for inspection reports and safety audits		
	FIXED NUCLEAR FACILITIES PLANS FILE Moved from the Emergency Services standard of the old County Management schedule	
HAZARDOUS MATERIALS MANAGEMENT Broadened description and added numerous dispositions for particular types of hazardous materials; now includes asbestos management plans		ASBESTOS MANAGEMENT PLAN
LOST, STOLEN, OR DAMAGED PROPERTY REPORTS Deleted citizen from description		
	NATIONAL FLOOD INSURANCE PROGRAM RECORDS Moved from the Emergency Services standard of the old County Management schedule	

RECORDS RETENTION AND DISPOSITION SCHEDULE

PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



NC DEPARTMENT OF
NATURAL AND CULTURAL RESOURCES

North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

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Program Records Schedule: Local Government Agencies

The records retention and disposition schedules and retention periods governing the records series listed herein are hereby approved. This approval extends to and includes the following standards in the **2021 Program Records Schedule: Local Government Agencies**:

10. Airport Authority Records
11. Animal Services Records
12. Code Enforcement and Inspection Records
13. Emergency Medical Services and Fire Department Records
14. Parks and Recreation Records
15. Planning and Regulation of Development Records
16. Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records
17. Public Transportation Systems Records
18. Public Utilities and Environmental/Waste Management Records
19. Street Maintenance, Public Works, and Engineering Records
20. Law Enforcement Records (excluding Sheriff's Offices)
21. Tax Records (for municipalities)

In accordance with the provisions of Chapters 121 and 132 of the *General Statutes of North Carolina*, it is agreed that the records do not and will not have further use or value for official business, research, or reference purposes after the respective retention periods specified herein and are authorized to be destroyed or otherwise disposed of by the agency or official having custody of them without further reference to or approval of either party to this agreement.

Destructions

N.C. Gen. Stat. § 121-5 authorizes the Department of Natural and Cultural Resources to regulate the destruction of public records. Furthermore, the local government agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. The North Carolina Administrative Code states:

“(a) Paper records which have met their required retention requirements and are not subject to legal or other audit holds should be destroyed in one of the following ways:

1. burned, unless prohibited by local ordinance;
2. shredded, or torn up so as to destroy the record content of the documents or material concerned;
3. placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned; or
4. sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

(b) When used in an approved records retention and disposition schedule, the provision that electronic records are to be destroyed means that the data and metadata are to be overwritten, deleted, and unlinked so the data and metadata may not be practicably reconstructed.

(c) When used in an approved records retention and disposition schedule, the provision that confidential records of any format are to be destroyed means the data, metadata, and physical media are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.”

All local government agencies should maintain logs of their destructions either in the minutes of their governing board or in their Records Management file. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed.

Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.

Audits and Litigation Actions

Records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

Electronic Records

All local government agencies and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. Agencies agree to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records.

Local government agencies should consider retention requirements and disposition authorities when designing and implementing electronic records management systems. Any type of electronically-created or electronically-stored information falls under the North Carolina General Assembly's definition of public records cited above. For example, e-mail, text messages, blog posts, voicemails, websites, word processing documents, spreadsheets, databases, and PDFs all fall within this definition of public records. In addition, N.C. Gen. Stat. § 132-6.1(a) specifies:

“Databases purchased, leased, created, or otherwise acquired by every public agency containing public records shall be designed and maintained in a manner that does not impair or impede the public agency's ability to permit the public inspection and examination of public records and provides a means of obtaining copies of such records. Nothing in this subsection shall be construed to require the retention by the public agency of obsolete hardware or software.”

Local government agencies may scan any paper record and retain it electronically for ease of retrieval. If an agency wishes to destroy the original paper records before their assigned retention periods have been met, the agency must establish an electronic records policy, including putting into place procedures for quality assurance and documentation of authorization for records destructions approved by the Government Records Section. This electronic records policy and releases for destruction of records must be approved by the Government Records Section. Agencies should be aware that for the purpose of any audit, litigation, or public records request, they are considered the records custodian obligated to produce requested records, even if said records are being maintained electronically by an outside vendor. Therefore, contracts regarding electronically stored information should be carefully negotiated to specify how records can be exported in case a vendor goes out of business or the agency decides to award the contract to a different vendor.

Reference Copies

All local government agencies and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods that allow these records to be destroyed when “*reference value ends*.” All local government agencies hereby agree that they will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “*destroy when reference value ends*.” If a local government agency does not establish internal policies and retention periods, the local government agency is not complying with the provisions of this retention schedule and is not authorized by the Department of Natural and Cultural Resources to destroy the records with the disposition instruction “*destroy when reference value ends*.”

Record Copy

A record copy is defined as “The single copy of a document, often the original, that is designated as the official copy for reference and preservation.”¹ The record copy is the one whose retention and disposition is mandated by these schedules; all additional copies are considered reference or access copies and can be destroyed when their usefulness expires. In some cases, postings to social media may be unofficial copies of information that is captured elsewhere as a record copy (e.g., a press release about an upcoming agency event that is copied to various social

¹ Society of American Archivists, *Dictionary of Archives Terminology*.

media platforms). Appropriately retaining record copies and disposing of reference copies requires agencies to designate clearly what position or office is required to maintain an official record for the duration of its designated retention period.

Transitory Records

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”²

North Carolina has a broad definition of public records. However, the Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called transitory records. They may be disposed of according to the guidance below. However, all public employees should be familiar with their appropriate retention schedule and any other applicable guidelines for their office. If there is a required retention period for these records, that requirement must be followed. When in doubt about whether a record is transitory or whether it has special significance or importance, retain the record in question and seek guidance from a DNCR records analyst.

Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed. Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails and calendar invites) have minimal value once the official action these records are supporting has been completed and documented. These records may be destroyed or otherwise disposed of once the action has been resolved.

Drafts and working papers, including notes and calculations, are materials gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of Chapter 132 of the General Statutes, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents that may be destroyed after final approval include:

- Drafts and working papers for internal and external policies
- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports;
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that is already formally documented.


Forms used solely to create, update, or modify records in an electronic medium may be destroyed in office after completion of data entry and after all verification and quality control procedures, so long as these records are not required for audit or legal purposes. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g., a signature or notary’s seal), they must be retained according to the disposition instructions for the records series encompassing the forms’ function.

It is further agreed that these records may not be destroyed prior to the time periods stated; however, for sufficient reason they may be retained for longer periods. These schedules supersede previous versions of these schedules and any localized amendments; they are to remain in effect from the date of approval until they are reviewed and updated.

² Ibid.

APPROVAL RECOMMENDED


Municipal/County Clerk or Manager
Title: County Manager



Sarah E. Koonts, Director
Division of Archives and Records

APPROVED

Head of Governing Body
Title: BOCC Chair



D. Reid Wilson, Secretary
Department of Natural and Cultural
Resources

County/Municipality: Union County

Effective: October 1, 2021

EXECUTIVE SUMMARY

- ✓ Some records are covered by the *General Records Schedule: Local Government Agencies* and, therefore, are not listed separately here.
- ✓ According to N.C. Gen. Stat. § 121-5(b) and N.C. Gen. Stat. § 132-3, you may destroy public records only with the consent of the Department of Natural and Cultural Resources (DNCR). The State Archives of North Carolina is the division of DNCR charged with administering a records management program. This schedule is the primary way the State Archives of North Carolina gives its consent. Without approving this schedule, your agency is obligated to obtain the State Archives of North Carolina's permission to destroy *any* record, no matter how insignificant.
- ✓ Each records series listed on this schedule has specific disposition instructions that will indicate how long the series must be kept in your office. In some cases, the disposition instructions are simply "retain in office permanently," which means that those records must be kept in your office forever. In other cases, the retention period may be "destroy in office when reference value ends." An agency may have reference copies of materials, meaning "a copy of a record distributed to make recipients aware of the content but not directing the recipient to take any action on the matter" (from Society of American Archivists, *Dictionary of Archives Terminology*). Your agency must establish and enforce internal policies by setting minimum retention periods for the records that the State Archives of North Carolina has scheduled with the disposition instructions, "destroy when reference value ends."
- ✓ E-mail is a record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. It is the content of the e-mail that is critical when determining the retention period of a particular e-mail, including attachments, not the media in which the record was created. It is important for all agency employees and officials to determine the appropriate records series for specific e-mails and retain them according to the disposition instructions listed with the identified record series.
- ✓ The State Archives of North Carolina recommends that all agency employees and officials view the tutorials that are available online through the State Archives website in order to familiarize themselves with records management principles and practices. The State Archives of North Carolina's online tutorials include topics such as records management and scanning guidelines.
- ✓ The State Archives of North Carolina creates security preservation record copies for minutes and selected other records of governing bodies and commissions, adoption records, and maps and plats. Agencies can request copies of the digital images made during this process. Contact the appropriate Records Management Analyst to begin this process.
- ✓ If you have records that are not listed in this schedule, contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do not have historical value, we will ask you to complete a [Request for Disposal of Unscheduled Records](#) (page A-19) for records that are no longer being created.

LEGEND FOR RECORDS SCHEDULE

This records retention and disposition schedule applies to records in all media, unless otherwise specified.



– symbol designating that one or more records in this series may be confidential or Includes confidential information.

Item # – an identifying number assigned to each records series for ease of reference.

Series – “a group of similar records that are . . . related as the result of being created, received, or used in the same activity.” (From Society of American Archivists, *Dictionary of Archives Terminology*). Series in this schedule are based on common functions in government offices.

Records Series Title – a short identification of the records in a series, based on their common function.

Series Description – a longer description of the records in a series, often including the types of records that can frequently be found in that series. This information is included underneath the Records Series Title.

Disposition Instructions – instructions dictating the length of time a series must be retained and how the office should dispose of those records after that time.

Citation – a listing of references to statutes, laws, and codes related to the records series. Citations can include:

- Authority: governing the creation of records
- Confidentiality: limiting access to public records
- Retention: setting a retention period

Throughout this schedule, items that cross-reference other items within this schedule are indicated with a SEE ALSO reference. If you hover your cursor over one of these items, you will see the hand tool that will enable you to click on the item to follow the link to that location.

AUDITS: PERFORMANCE

Records concerning internal and external audits conducted to assess the function of government programs. Includes reports, working papers, corrective measures, and other related records.

SEE ALSO: Audits: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS).

Sample records series title and description with cross-reference included

No destruction of records may take place if litigation or audits are pending or reasonably anticipated. See also AUDITS, LITIGATION, AND OTHER OFFICIAL ACTIONS, page A-5.

STANDARD 10: PROGRAM OPERATIONAL RECORDS – AIRPORT AUTHORITY RECORDS

Official records and materials created and accumulated incidental to the operation of a county or municipal airport.

ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.01	ACCESS CONTROL RECORDS Records concerning employee or contractor access to facilities or resources.	Destroy in office 1 year after expiration.	
10.02	AIR SPACE CONSTRUCTION Applications to construct structures which may obstruct flight space. Includes correspondence and related records.	Destroy in office after 5 years.	
10.03	AIRFIELD INSPECTION Records concerning airfield inspections on runway conditions, fueling agents, fire and rescue facilities, ground vehicle control and other airport condition information.	Destroy in office after 1 year.	Authority/Retention: 14 CFR 139.301
10.04	AIRPORT MASTER RECORD Federal Aviation Administration (FAA) form 5010 documenting basic information concerning airports.	Destroy in office when superseded or obsolete.	

10: Airport Authority

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 10: AIRPORT AUTHORITY RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
10.05	LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS Records documenting local government and airport authority land use and development planning.	Retain in office permanently.	
10.06	RADIO LOGS Records of radio calls received and placed.	Destroy in office after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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STANDARD 11: PROGRAM OPERATIONAL RECORDS – ANIMAL SERVICES RECORDS



Records created and received during the conduct of animal services programs.

NOTE: Some records are covered by General Records Schedule: Local Government Agencies and, therefore, are not listed separately here. See Reference (Reading) File and Reports and Studies (Administration and Management Records).

ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.01	ANIMAL ABUSE AND CRUELTY RECORDS Includes complaints, citations and/or compliance orders, and other related records.	Destroy in office after 5 years.*	See G.S. 14-360 for definition of animal cruelty.
11.02	ANIMAL COMPLAINT RECORDS Includes complaints of animal nuisances.	Destroy in office after 3 years.*	
11.03	ANIMAL CONTROL RECORDS Records of animal control calls. Includes information regarding animal bites, animals received from residents, strays caught, animals taken to shelter or returned to owner, use of tranquilizer guns, and other related records. Also includes citations and/or compliance orders issued to animal owners for violations of government ordinances.	a) Destroy in office records concerning dangerous animals when known dead or after 10 years. b) Destroy in office animal control citations and compliance orders after 3 years.* c) Destroy in office remaining records after 1 year.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 11: ANIMAL SERVICES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
11.04 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Confidentiality: G.S. 132-1.2 (2)
11.05 	ANIMAL SHELTER RECORDS Records of animals impounded at the shelter, including date of impoundment, length of impoundment, disposition of animal, and any other information required by rules adopted by the State Board of Agriculture. Also includes certificates of animal release (e.g., adoption, reclaim, transfer, return to field) and owner contact records.	Destroy in office 3 years after date of impoundment.	Authority/Retention: G.S. 19A-32.1(j) Confidentiality (for specific counties): G.S. 132-1.15
11.06	CONTROLLED SUBSTANCE EUTHANASIA LOG Includes amount of controlled substances used.	Destroy in office after 2 years.	Retention: 21 CFR 1304.04
11.07	HISTORIES OF PET OWNERS Records concerning information for each animal owner who violates government ordinances. Includes complaint forms and other related records.	Destroy in office after 3 years.*	
11.08	RABIES VACCINATION RECORDS Includes rabies vaccination certificates submitted to agency by area veterinarians.	Destroy in office after 3 years.	Authority: G.S. 130A-189


* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

STANDARD 12: PROGRAM OPERATIONAL RECORDS – CODE ENFORCEMENT AND INSPECTION RECORDS

Official records and materials created and accumulated during the conduct of local government code enforcement and inspection programs.

NOTE: Some records are covered by the General Records Schedule: Local Government Agencies and, therefore, are not listed separately here.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.01	AIR POLLUTION SOURCE INFORMATION Includes records for facilities which are no longer operational.	Destroy in office after 2 years.*	
12.02	 BLUEPRINTS AND SPECIFICATIONS Records concerning blueprints and specifications of local government owned buildings and facilities, or drawings submitted when applying for a building permit for new construction. Includes as-built plans and related records concerning approved changes or used in determining code compliance and enforcement of building code. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain agency blueprints and specifications for life of structure. b) Destroy in office commercial blueprints and specifications 1 year after completion of project. c) Destroy in office residential blueprints and specifications when reference value ends.± Agency Policy: Destroy in office after <u>6 years.</u>	Confidentiality: G.S. 132-1.7

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.03	BUILDING AND ROAD PERMITTING AND INSPECTION RECORDS Records documenting applications for permits from property owners to erect new structures or manufactured homes, or to make structural modifications, demolition, fire permits, or the installation of plumbing, electrical, or mechanical systems. Includes permits, inspection reports, inspector's worksheets, inspection requests, denial reports, sketches, correspondence (including e-mail), and contractor change forms.	a) Destroy in office permits, applications, and inspection reports (or worksheets) 6 years after Certificate of Occupancy is issued or project is complete (inactive). b) Destroy in office Certificate of Occupancy 6 years after permit is expired. c) Destroy in office remaining records, including applications for which a permit was never issued, when reference value ends.± Agency Policy: Destroy in office after <u>2 years.</u>	
12.04	CONTROLLED SUBSTANCE LABS DECONTAMINATION RECORDS Records concerning decontamination compliance.	Destroy in office 3 years after documented decontamination is complete.	
12.05	DROUGHT CONTINGENCY PLANS Includes water conservation plans in the event of a drought.	Destroy in office when superseded or obsolete.	
12.06	EROSION AND SEDIMENT CONTROL ENFORCEMENT CASES Includes settled legal matters and penalties. SEE ALSO: Violations: Building and Housing, below.	Destroy in office 6 years after settlement.*	


* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.07	EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans as well as revisions and addenda.	a) Destroy in office approved plans 6 years after approval or last revision and/or addendum. b) Destroy in office non-approved plans after 3 years.	
12.08	EXEMPTION (VARIANCE) RECORDS Records concerning exemptions and variances concerned with the installation of water, sewer, gas, or electric lines.	a) Destroy in office 5 years after expiration.* b) Destroy in office records for which an exemption or variance was not issued after 3 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.09	GOING-OUT-OF-BUSINESS LICENSES Records concerning licenses granted to business to hold going out of business, water and smoke damage, and distress sales.	Destroy in office 1 year expiration.	
12.10	GROUNDWATER MONITORING RECORDS Includes all groundwater monitoring wells and associated groundwater surface elevations.	Destroy in office after 5 years.*	Authority: 15 NCAC 2C .0100
12.11	ILLEGAL DUMPING FILE Records concerning illegal dumping complaints received. SEE ALSO: Violations: Solid Waste Management, below.	Destroy in office after 5 years.*	
12.12	INSPECTIONS Inspections conducted by local government agencies concerning enforcement of state and local laws, codes, and ordinances.	Destroy in office after 6 years.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.13	LEAD AND COPPER COMPLIANCE RECORDS Includes all monitoring records required by federal, state, and local regulations.	Destroy in office after 12 years.*	Retention: 40 CFR 141.91
12.14	LANDFILL TONNAGE AND COST FILE	Destroy in office after the 5 year reporting period is complete.	
12.15	PERMITS: CONSTRUCTION Records documenting applications and permits regarding sign installation, fencing, swimming pools, driveways, or similar activity required by local ordinance. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Miscellaneous (Non-Building) Applications, Licenses, and Permits (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 3 years after completion of project. b) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after <u>2 years.</u>	
12.16 	PERMITS: PUBLIC UTILITIES PROJECTS Records documenting permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain in office approval letters and supporting documentation permanently. b) Destroy in office permits 6 years after expiration, cancellation, revocation, or denial.*	Authority: 40 CFR 122.28 15A NCAC 18C .0300 Confidentiality: 15A NCAC 02H .0115

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.17	RECREATIONAL VEHICLE REGISTRATION RECORDS Records concerning issuance of registrations/decals for recreational vehicles. Includes, but is not limited to, golf carts, canoes, and mopeds as well as proof of insurance and renewals.	Destroy in office 1 year after expiration.*	
12.18	UNSAFE BUILDINGS FILE Records documenting inspections and notifications to owners of unsafe conditions relative to a particular structure. SEE ALSO: Violations: Building and Housing, below.	Destroy in office after 6 years provided all issues have been resolved.*	
12.19	VALVE OPERATION FILE	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____ life of the asset plus 3 years.	
12.20	VIOLATIONS: BUILDING AND HOUSING Records documenting violations of building and fire code, minimum housing, and erosion and sediment control. Includes complaints, summons, notices, appeals, and other information created or compiled during the course of investigation and resolution of each alleged violation. SEE ALSO: Water Analysis, below.	a) Destroy building code violations in office 6 years after verification of correction. b) Destroy remaining records in office 3 years after verification of correction.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.21	VIOLATIONS: SOLID WASTE MANAGEMENT Includes complaints, notices of violations, citations, investigation records, court documents, and other related records issued by solid waste environmental enforcement programs.	Destroy in office 7 years after resolution of case.*	
12.22	VIOLATIONS: WATER CONSERVATION Records concerning notices of water conservation violations.	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____ corresponding IBT permit expiration.	
12.23	WASTEWATER POLLUTION CONTROL AND ABATEMENT RECORDS	Destroy in office after 5 years.*	Authority: 15A NCAC 2B .0505
12.24	WASTEWATER QUALITY ANALYSIS RECORDS	a) Destroy in office analysis reports after 3 years.* b) Destroy in office monitoring and calculation sheets after 1 year.*	Authority: 15A NCAC 2B .0505

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
12.25	WATER ANALYSIS Records concerning bacteriological, chemical, radiological, and physical analyses and climatological observations as well as records of actions taken to correct violations. SEE ALSO: Violations: Building and Housing and Violations: Water Conservations, above.	a) Destroy in office records of chemical and radiological analysis after 10 years. b) Destroy in office records of bacteriological and turbidity analysis after 5 years. c) Destroy in office records of actions taken to correct violations 3 years after last corrective action taken. d) Destroy in office remaining records after 5 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.26	WATER SYSTEM OPERATIONS RECORDS Records concerning the operations of water supply, treatment, distribution, and collection. Includes backflow prevention reports, flow reports, capacity studies, pump station reports, and similar records that summarize	Destroy in office after 10 years.	Retention: 40 CFR 141.33 15A NCAC 18C .1526
12.27	WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS FILE	Destroy in office after 5 years.*	



* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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STANDARD 13: PROGRAM OPERATIONAL RECORDS – EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS


Official records documenting the primary functions of emergency services programs and fire departments.

Footage from body-worn cameras is scheduled by the content captured or the purpose of the footage rather than by its format. Recordings may fit under FIRE INVESTIGATION CASE FILES, DISPATCH RECORDS AND RECORDINGS, PUBLICITY RECORDS (General Schedule), TRAINING AND EDUCATIONAL RECORDS (General Schedule), and other items as appropriate. Footage is only confidential if it fits within an item where confidentiality is conferred by state or federal statute.

ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.01 	911 COMMUNICATION RECORDS AND RECORDINGS Records documenting any communications made by the public with 911. Includes transcripts and recordings of 911 calls received, transcripts of text messages received by 911, and computer-aided dispatch (CAD) reports. SEE ALSO: Dispatch Records and Recordings, below AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS)	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.5 G.S. 132-1.4(c)(4) Retention: G.S. 132-1.4(i)
13.02 	AMBULANCE CALL REPORTS (ACR)/PATIENT CARE REPORTS (PCR) Records concerning equipment used, patient location, nature of call, vital signs and other physical signs, care rendered, medicine ordered, etc.	a) Transfer copy of report to the admitting hospital for inclusion into patient's medical record. b) Destroy original in office after 3 years.*	Confidentiality: G.S. 130A-12


* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.03	BUILDING AND FIRE SAFETY SYSTEM PLANS Records concerning plans and fire safety systems of commercial, industrial, and government-owned properties.	Destroy in office when superseded or obsolete.	
13.04	 DISPATCH RECORDS AND RECORDINGS Records and recordings concerning activities during an emergency services dispatch. Includes company run reports and fire journals as well as ambulance dispatch and service run records. Also includes footage from body-worn cameras of EMS and Fire Department personnel when responding to an emergency if not otherwise included in a separate item. SEE ALSO: 911 Communication Records and Recordings, above AND PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Communication Records (STANDARD 20: LAW ENFORCEMENT RECORDS).	Destroy in office after 30 days, if not made part of a case file.*	Confidentiality: G.S. 132-1.4 G.S. 143-518 45 CFR 164.501 42 U.S.C. 1395x
13.05	FIRE ALARM AND AUTOMATIC EXTINGUISHER FILE Records documenting licenses and insurance certificates of companies that perform installations of fire alarm and automatic extinguishing systems.	Destroy in office when superseded or obsolete.	
13.06	FIRE DISPATCH FILE Records concerning fire dispatch zones. Includes maps of fire dispatch zones, census tract information, annexation research, street closings, and other related material.	Destroy in office when superseded or obsolete.	


* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.07	FIRE INVESTIGATION CASE FILES Records concerning investigations of fire. Includes reports, photographs, evidence, and other related records.  SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Case File: Felonies AND Case File: Misdemeanors (STANDARD 20: LAW ENFORCEMENT RECORDS).	a) Retain in office permanently when loss of life occurs or if a publicly-owned building is involved.* b) Destroy in office after 10 years when arson is involved.* c) Destroy in office after 5 years when cause of fire is determined to be accidental and no loss of life occurs.*	Confidentiality: G.S. 132-1.4
13.08	FIRE SAFETY INSPECTIONS AND PERMITS Records documenting inspections of and permits issued for fire protection measures and procedures for systems and buildings.	a) Destroy in office inspections with no defects after 3 years. b) Destroy in office inspections with noted defects 3 years after defects are corrected.* c) Destroy in office permits 3 years after expiration.	
13.09	NORTH CAROLINA FIRE INCIDENT REPORT Includes report required by state statute to document certain fire incidents. <i>For retention of copies of fire incident reports filed with other agencies, see: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Reports (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).</i>	Retain original report permanently.	Authority/Retention: G.S. 58-79-45

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
13.10 	PHARMACEUTICAL AND NARCOTICS RECORDS Records documenting the administration of pharmaceuticals and narcotics to patients as required by the Drug Enforcement Agency.	Destroy in office after 3 years.*	Authority: 21 CFR 1310.03 Confidentiality: G.S. 130A-12 Retention: 21 CFR 1310.04

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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STANDARD 14: PROGRAM OPERATIONAL RECORDS – PARKS AND RECREATION RECORDS

Records created and received by Parks and Recreation departments.

ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.01	ADMISSION RECORDS Records of admissions to parks or recreation facilities.	Destroy in office after 3 years.*	
14.02	CITATIONS RECORDS Citations issued by park personnel to persons who violate park rules and regulations.	Destroy in office after 2 years.	
14.03	OFFICIALS FILE Records concerning individuals who officiate games. Includes schedule and correspondence (including e-mail). SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) or Seasonal and Contract Worker Records (STANDARD 4: HUMAN RESOURCES RECORDS) for disposition of payment records.	Destroy in office after 3 years.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.04	PARKS PLANNING FILE Records concerning master plans and working plans for each park property and recreational facility which show layout, topography, and proposed developments and improvements. Includes drainage and resource maps, aerial maps, site analysis drawings, construction plans, and as-built drawings. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS) AND GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Parks (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS (GIS) RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>10 years.</u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	
14.05	POOL RECORDS Records concerning monthly reports indicating operational data, chemicals used, chlorination levels and other information relating to pool construction, maintenance, and health and safety.	Destroy in office after 1 year.	
14.06	 RECREATION PROGRAMS Records concerning athletic and recreation programs. Includes staff notes, lesson plans, course descriptions, instruction manuals, schedules, team rosters, reservation records, copies of receipts for fees paid, age verification records, and concession operators list.	a) Destroy in office program records after 3 years. b) Destroy age verification records when reference value ends.± Agency Policy: Destroy in office after <u>3 years.</u>	Confidentiality: G.S. 132-1.12

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 14: PARKS AND RECREATION RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
14.07	TICKET STUBS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>n/a.</u>	

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STANDARD 15: PROGRAM OPERATIONAL RECORDS – PLANNING AND REGULATION OF DEVELOPMENT RECORDS

Official records and materials created and accumulated during the conduct of local government planning, regulation of development, and zoning programs.

Community Development Block Grants (CDBG) records are found in Standard 16: Public Housing Authorities, Redevelopment Commissions, and Entitlement Communities Records.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.01	BOARD OF ADJUSTMENT CASE FILES AND INDEXES Cases submitted to the board requesting variances from current zoning ordinances. Includes indexes to cases reviewed by the board.	a) Retain indices in office permanently. b) Destroy in office case files after 6 years.*	Retention: G.S. 1-50(5)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.02	CERTIFICATES OF APPROPRIATENESS Certificates submitted by the Historic Preservation Commission allowing alterations to exterior portions of building and structures on or within historic landmarks and districts. Includes applications and other related records.	a) Retain in office certificates for life of structure and then destroy. b) Destroy in office denied applications when reference value ends. ± Agency Policy: Destroy in office after <u>3 years.</u> c) Destroy in office remaining records when reference value ends. ± Agency Policy: Destroy in office after <u>5 years.</u>	Authority: G.S. 160A-400.9
15.03	COMPREHENSIVE PLAN AND AMENDMENTS Official copies of comprehensive plan and all background surveys, studies, reports, draft versions of plans, and supporting documentation. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain in office permanently adopted plan and amendments. b) Destroy in office remaining records 3 years after adoption of plan.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.04	CONDITIONAL USE PERMIT RECORDS AND INDEX Records concerning applications for conditional use permits. Permits allow for the construction of buildings, on the condition that impacts on neighborhoods are mitigated. Includes original application, blueprint drawings, investigative reports, planning commission recommendations, cash receipts, and related correspondence (including e-mail). Also includes reference copies of variances or exceptions from zoning regulations granted by the Board of Adjustment.	a) Destroy in office 3 years after discontinuance of use. b) Destroy in office applications for which a permit was never issued when reference value ends. ± Agency Policy: Destroy in office after <u>1 year</u>	
15.05	DECLARATIONS AND BY-LAWS FROM TOWNHOUSES, CONDOMINIUMS, PLANNED RESIDENTIAL DEVELOPMENTS, COMMON AREAS, ETC.	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____ the development is closed and all bonds are released.	Authority: G.S. 47C-2-103
15.06	ENVIRONMENTAL IMPACT STUDIES Records and reports concerning the environmental impact of major projects proposed by localities and reviewed by local officials.	Retain in office permanently.	
15.07	OPEN SPACE CLASSIFICATION CASE FILE	Retain in office permanently.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.08	PERMITS: TEMPORARY MANUFACTURED HOME Records created to temporarily authorize the location of a manufactured home on the same lot as a single family residence.	Destroy in office 6 years after permit expires.	Retention: G.S. 1-50(5)
15.09	PERMITS: ZONING COMPLIANCE For residential uses, non-residential uses, and accessory structures.	a) Retain in office permits concerning subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office permits concerning subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other permits and related records 6 years after last entry.	Retention: G.S. 1-50(5)
15.10	PETITION & REGULATION RECORDS	Destroy in office after 5 years.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.11	PLANNING REVIEW CASE FILE For required review of site plan, zoning variance, special permit, change of zoning, subdivision creation or enlargement, municipal or county planning action, or other required review; including, but not limited to, maps, plans, sketches, photographs, engineering reports, environmental impact statement and studies, copies of zoning records, project narrative, correspondence (including e-mail), and record of final determination.	a) Retain plan reviews and related records containing subdivision, historical structure, major commercial or industrial development, or capital construction, where county or municipality is lead agency, permanently. b) Destroy in office plan reviews and related records containing subdivision, historic structures, major commercial or industrial development, or capital construction, where county or municipality is not lead agency, 6 years after last entry. c) Destroy in office any other mandatory reviews and related records 6 years after last entry.	Retention: G.S. 1-50(c)
15.12	REZONING RECORDS AND INDEXES Records concerning applications to rezone property within the county or municipality. Includes original applications, review forms, maps of areas involved, copies of investigative reports, copies of relevant planning board minutes, notices of hearings, and development agreements.	Retain in office permanently.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
15.13	SUBDIVISION RECORDS Includes maps, plats, topographical data, names of streets, records of public utilities, action by council, etc. Also includes preliminary subdivision and group development site plans. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps: Plats (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEMS RECORDS).	a) If not filed in Register of Deeds or similar agency, retain in office permanently. b) If filed in Register of Deeds or similar agency, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>10 years</u>	
15.14	VARIANCES Includes zoning variances, watershed variances, and subdivision variances.	Retain official copies permanently in the minutes of the Board of Adjustment or other governing body.	
15.15	VIOLATIONS: ZONING Records concerning notices of zoning violations.	Destroy in office after 6 years.*	Retention: G.S. 1-50(5)

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STANDARD 16: PROGRAM OPERATIONAL RECORDS – PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS

Official records and materials created and received by public housing authorities, redevelopment commissions, and entitlement communities operated by local government agencies. Where there is a local funding match required to qualify for grant programs, all records should be retained according to the grant requirements listed below.

NOTES: Some records, such as those for Section 8 assistance, are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here. See Bond Closing Records (Budget, Fiscal, and Payroll Records), Grants (Administration and Management Records), and Grants: Financial (Budget, Fiscal, and Payroll Records). 24 CFR Parts 50-58 lay out the environmental review responsibilities of entities but do not establish specific retention requirements, so these records should be handled in accordance with the requirements of the funding source.

ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.01	APPRAISAL PROJECT FILE Evaluations of properties and structures within proposed projects. File includes financial assessments of the worth of real estate and building within proposed project areas. File may also include assessments of architectural and historical significance and condition of the involved structures and real estate.	a) Retain records with historical value permanently. b) Destroy in office remaining records 5 years after completion of abandonment of project.*	


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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.02	COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS Records concerning the administration of projects funded under the Community Development Block Grant (CDBG) program, including both direct grants and regrants. Includes applications, reports, audits, certificates, maps, and other related records.	a) Retain records with historical value permanently. b) Destroy in office rejected applications after 1 year. c) Destroy in office remaining records 4 years after execution of the closeout agreement for the grant.	Retention: 24 CFR 570
16.03	COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: OUTSTANDING LOAN BALANCES Records concerning individual activities under the Community Development Block Grant (CDBG) program for which there are outstanding loan balances, other receivables, or contingent liabilities. Includes reports, audits, and other related records.	a) For recipients, destroy in office 3 years after the receivables or liabilities have been satisfied. b) For subrecipients, destroy in office after such receivables or liabilities have been satisfied.	Retention: 24 CFR 570.502(a)(7)(i)(B)
16.04	COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY Records concerning real property which was acquired or improved in whole or in part using Community Development Block Grant (CDBG) funds. Includes reports, audits, and other related records.	a) For recipients, destroy in office 3 years after these provisions no longer apply to the activity. b) For subrecipients, destroy in office when these provisions no longer apply to the activity.	Authority: 24 CFR 570.503(b)(7) 24 CFR 570.505 Retention: 24 CFR 570.502(a)(7)(i)(B)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.05	CONTINUUM OF CARE RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes required Federal compliance records, program records, financial records, and other related records.	a) Destroy in office records documenting the acquisition, new construction, or rehabilitation of a project site 15 years after the date site is first occupied/used. b) Destroy in office program participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. c) Destroy in office all remaining records after 5 years.	Retention: 24 CFR 578.103(c)
16.06 	CRIMINAL RECORDS CHECKS Records received by the local agency to screen applicants for admission to covered housing programs and for lease enforcement or eviction.	Destroy in office once the purpose for which the record was requested has been accomplished, including expiration of the period for filing a challenge to the PHA action without institution of a challenge or final disposition of any such litigation.	Confidentiality/ Retention: 24 CFR 5.903(g) 24 CFR 5.905(c)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.07	EMERGENCY SOLUTIONS GRANTS (ESG) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes case management records for program participants, required federal compliance records, program records, financial records, and other related records.	a) Destroy records supporting the expenditure of federal funds passed through NC Department of Health and Human Services (DHHS) on a fiscal year basis when the DHHS Office of the Controller provides written guidance that records are released from all audits and other official actions. b) Destroy in office records documenting renovation of an emergency shelter 10 years after the date that ESG funds are first obligated for the renovation. c) Destroy in office participant records 5 years after the expenditure of all funds from the grant under which the program participant was served. d) Destroy in office all remaining records after 5 years.	Confidentiality: 24 CFR 576.500(x) Retention: 24 CFR 576.500(y)
16.08	FAÇADE PROJECT FILES Records documenting the re-granting of funds received by the agency to restore exteriors of architecturally important structures in project areas. Includes contracts, photographs, and correspondence.	Retain in office permanently.	

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.09	HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes records concerning designation as a participating jurisdiction, program records, project records, Community Housing Development Organizations records, financial records, program administration records, records concerning other federal requirements, and other related records.	a) Destroy in office rental assistance records 5 years after termination of assistance.* b) Destroy in office written agreements 5 years after termination.* c) Destroy in office 5 years after the affordability period terminates records of individual tenant income verifications, projects rents and inspections, and documents imposing recapture/resale restrictions. d) Destroy in office records covering displacements and acquisition 5 years after final payment.* e) Destroy in office remaining records after 5 years.*	Authority/Retention: 24 CFR 92.508
16.10	HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes verifications of disability, grant agreements, performance reports, and other related records.	Destroy in office 5 years after the end of the grant term.	Retention: 24 CFR 582.301(c) 24 CFR 583.305(c)

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ITEM #	STANDARD 16: PUBLIC HOUSING AUTHORITIES, REDEVELOPMENT COMMISSIONS, AND ENTITLEMENT COMMUNITIES RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
16.11	HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) RECORDS Records documenting the participation of the agency in funding by the Department of Housing and Urban Development. Includes grant agreements, performance reports, and other related records.	Destroy in office after 5 years.	Authority/Retention: 24 CFR 574 24 CFR 5.106(d)
16.12	LANDLORD MONITORING RECORDS Records documenting monitoring of landlords of properties used in affordable or subsidized housing programs. Includes certifications and forms and other compliance-related records.	Destroy in office after 5 years.	
16.13	REDEVELOPMENT PLANS Records concerning redevelopment projects. Includes documentation of the review and certification process.	a) Retain in office permanently records concerning approved redevelopment projects. b) Destroy in office remaining records 2 years after rejection.	

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STANDARD 17: PROGRAM OPERATIONAL RECORDS – PUBLIC TRANSPORTATION SYSTEMS RECORDS

Records received and created by area transit systems and authorities necessary to meet all statutory requirements.

NOTE: Some records are covered by the Local Government Agencies General Records Retention and Disposition Schedule and, therefore, are not listed separately here.

Comply with requirements of the Federal Transit Administration's **Best Practice Procurement Manual**, Master Agreement MA(11) Section 8 manual.

ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.01	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT RECORDS Includes driver's daily assignments, dispatch records, logs of passenger pick-ups and drop-offs, manifests, trip requests, and appeal forms.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.02	AMERICANS WITH DISABILITIES ACT (ADA) PARATRANSIT VOUCHERS Vouchers submitted by private transportation companies for reimbursement for alternative transportation of public transit clients.	Destroy in office after 5 years.*	Authority: 2 CFR 200.333
17.03	AMERICANS WITH DISABILITIES ACT (ADA) PRE-TRIP INSPECTION FORMS	Destroy in office after 1 year.	Authority: 2 CFR 200.333

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.04	APPLICATIONS FOR ART-IN-TRANSIT Applications and supporting documentation submitted by regional and national artists for exhibit on agency property.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>3 years</u>	
17.05	APPLICATIONS FOR DISCOUNT PASSES Applications, certificates of disability, and supporting documentation used to apply for discount passes.	Destroy in office 3 years after service is terminated or denied.	
17.06	APPLICATIONS FOR TRANSIT SERVICE Includes customer applications, eligibility assessment records, correspondence (including e-mail), health information, riders' guides, and related records.	Destroy in office 3 years after service is terminated or denied.	
17.07	CUSTOMER (RIDER) IDENTIFICATION RECORDS Records concerning customer identification, approvals, denials, and related information.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>5 years after closeout</u> of related grant	
17.08	DISADVANTAGED BUSINESS ENTERPRISE (DBE) RECORDS Includes company's articles of incorporation, financial statements, signed affidavits, letters of reference, declarations, Federal Schedule A or B, and related correspondence (including e-mail).	a) Destroy in office company-specific records 5 years after company is removed from certified list. b) Destroy in office related DBE program records, including Federal Transit Administration reports, 5 years from date record was created.	Authority: 2 CFR 200.333
17.09	OPERATOR SHIFT INSPECTION RECORDS Reports and similar records of operator's inspections of vehicle at the beginning and end of shift.	Destroy in office after 5 years.	Authority: 2 CFR 200.333

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ITEM #	STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
17.10	ROUTE HISTORY RECORDS Includes descriptions of routes, bus stops, passenger lists, and other related records.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>5 years after closeout of related grant</u>	
17.11	SEAT BELT AND RESTRAINT SYSTEM RECORDS Records concerning the use and installation of seat belts and other restraint systems in vehicles.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>life of vehicle ends</u>	
17.12	TRANSIT SCHEDULES Printed route schedules and related information used to generate schedules.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>5 years after closeout of related grant</u>	
17.13	VANPOOL DRIVER APPLICATIONS Applications and supporting records submitted by persons operating vanpool vehicles.	a) Destroy in office accepted applications 3 years after person leaves program. b) Destroy in office applications for persons not accepted for program after 1 year.	

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STANDARD 18: PROGRAM OPERATIONAL RECORDS – PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS

Official records and materials created and accumulated for use by municipal and county sanitation, water, sewage, electrical, and gas operations. Also contains environmental management records accumulated for use by erosion and sediment control, flood control, and monitoring of pollution. Comply with applicable provisions of G.S. §132-1.7 regarding confidentiality of public infrastructure detailed plans and drawings.

ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.01	ENVIRONMENTAL: COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN AND AMENDMENTS SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u>1 year</u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Authority: G.S. 130A-309.09A
18.02	ENVIRONMENTAL: CUSTOMER USAGE RECORDS Includes reports, plans or similar records submitted by industrial users or publicly-owned treatment works concerning intended or actual use of the wastewater treatment system.	Destroy in office after 3 years.*	Retention: 40 CFR 403.12(o)(3)
18.03	ENVIRONMENTAL: DAILY DISPOSAL TICKETS Record and/or receipts concerning the disposal of materials at the landfill.	Destroy in office after 3 years.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.04	ENVIRONMENTAL: DISCHARGE MONITORING REPORTS Includes discharge and non-discharge monitoring reports submitted to state and/or federal regulatory agencies. Also includes copies of monthly reports required by National Pollution Discharge Elimination System (NPDES) permits.	a) Destroy in office NPDES reports 5 years from date of submission.* b) Destroy in office annual reports 5 years from date of submission.* c) Destroy in office daily reports after 3 years.	Retention: 40 CFR 122.41(3)(j)(2) 15A NCAC 2B .0506
18.05	ENVIRONMENTAL: LANDFILL MONITORING REPORTS Gas and groundwater monitoring records and reports. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Retain official reports permanently. b) Destroy in office remaining records after 3 years.	Retention: 15A NCAC 13B .1626(10)
18.06	ENVIRONMENTAL: LANDFILL OPERATIONAL PLAN Describes the intended schedule of construction, description of on-site waste handling procedures during active life of the facility, contingency plans, description of maintenance of installed equipment, and any other information pertaining to the operation, maintenance, monitoring, or inspections as may be required by federal and state law.	Destroy when superseded or obsolete.*	Authority: G.S. 130A-309.09D

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.07	ENVIRONMENTAL: LANDFILL PERMITS Permits and related records of landfills owned or operated by agency. Includes amendments and hazardous waste management permits.	a) Retain construction and operation permit for life of system and then destroy. b) Destroy in office all other permits and related records after the 5-year reporting period is complete.	Retention: G.S. 130A-294 (b1) (4)
18.08	ENVIRONMENTAL: NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR DISPOSAL FILE Notices issued by agency concerning improper non-stormwater discharge or disposal. Includes improper disposal of waste or products, chlorinated pool discharge, vehicle maintenance facility runoff, food service waste, and other unregulated commercial and industrial discharges.	Destroy in office one year after resolution.	
18.09	ENVIRONMENTAL: OUTSIDE WASTE CLEARANCE RECORDS Records allowing parties outside the operator's jurisdiction to dispose of waste at landfill.	Destroy in office 3 years after expiration of agreement.	
18.10	ENVIRONMENTAL: REPORTS SUBMITTED TO U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA)	Destroy in office after 2 years.*	
18.11	EROSION CONTROL: EROSION AND SEDIMENT AFFIDAVITS Forestry and agricultural affidavits clarifying land use exempt from land-disturbing activity standards.	Destroy in office after 6 years.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.12	EROSION CONTROL: EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS	Destroy in office when reference value ends. ± Agency Policy: Destroy in office after _____ 1 year after project completion.	
18.13	EROSION CONTROL: EROSION AND SEDIMENT CONTROL INSPECTIONS Inspections conducted by agency. Includes inspection requests, notices of violations, denial reports, sketches, plans, correspondence (including e-mail), and similar records concerning the construction, modification or demolition of existing and new roads and construction sites.	Destroy in office 6 years after final site inspection.*	
18.14	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PERMITS Records concerning permits, including permit logs, issued for site construction.	a) Destroy in office records concerning approved permits 3 years after expiration of permit. b) Destroy in office non-approved permits after 3 years.	
18.15	EROSION CONTROL: EROSION AND SEDIMENT CONTROL PLANS Includes approved and disapproved plans submitted to agency. Includes revisions, addendums, and records delineating who is financially responsible for the project.	a) Destroy approved plans in office 3 years after expiration. b) Destroy non-approved plans after 3 years.	Authority: 15A NCAC 04B .0118



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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.16	EROSION CONTROL: TROUT BUFFER VARIANCES Includes denials and waivers. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Variances (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).	a) Destroy in office 6 years after approval of permit. b) Destroy in office after 3 years plans for which a permit was not issued.	Authority: 15A NCAC 04B .0125
18.17	FLOOD CONTROL: FLOOD CERTIFICATIONS Records concerning lot reviews for construction projects submitted to agency. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Permits: Zoning Compliance (STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS).	Destroy in office when superseded or obsolete.	
18.18	FLOOD CONTROL: FLOOD STUDIES Reviews of stream crossings for construction projects submitted to agency.	Retain in office for life of structure and then destroy.*	
18.19	UTILITIES: DAILY WATER AND WASTEWATER FACILITY OPERATORS LOGS Records concerning water distribution and treatment.	a) Destroy in office records concerning the operation of wastewater treatment facilities after 5 years.* b) Destroy in office records concerning the operation of water treatment facilities after 3 years.*	Authority: 15A NCAC 18C .1301


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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.20 	UTILITIES: ELECTRIC POWER AND NATURAL GAS FACILITY ENGINEERING AND SYSTEM PLANS Includes authorizations to construct, building plans, and specifications of privately owned utilities. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) If an element of the Strategic Plan, destroy in office when reference value ends. ± Agency Policy: Destroy in office after <u> n/a </u> b) If not an element of the Strategic Plan, destroy in office when superseded or obsolete.	Confidentiality: G.S. 132-1.7
18.21	UTILITIES: ELECTRIC POWER AND NATURAL GAS PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute and issued by agency.	a) Destroy in office permits 5 years after expiration, cancellation, revocation or denial.* b) Retain approval letters and supporting documentation permanently.	
18.22	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MAINTENANCE AND REPAIR RECORDS Records documenting installation, location, specifications, and maintenance history of meters, lines, pipes, pumps, and similar system equipment.	Destroy in office 3 years after equipment is no longer owned and/or operational.	
18.23 	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MANAGEMENT PLANS SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Strategic Plan (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Retain in office for life of system and then destroy.	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.24	UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT RECORDS	a) Retain project pre-approval and final approval letters for life of system and then destroy. b) Destroy in office remaining records 5 years after project is completed.	
18.25	UTILITIES: LANDLORD AGREEMENTS Agreements to automatically transfer utility accounts to landlords when their tenant vacates a property.	Destroy in office 3 years after expiration of agreement.	
18.26	 UTILITIES: MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS) Includes maps, plats, charts, and similar records showing the location of water mains, valves, hydrants, meters, etc., throughout the system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Maps, All Other (STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS).	Retain for life of system and then destroy.	Authority: 15A NCAC 18C .0300 Confidentiality: G.S. 132-1.7


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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.27	UTILITIES: METER INSTALLATION, TESTING AND CALIBRATION RECORDS (ELECTRIC, WATER, GAS) Includes records concerning the installation or planned installation of meters and connecting any facility to utility system owned or operated by the agency.	a) Destroy in office records verifying installation of meter 3 years after equipment is no longer owned and/or operational. b) Destroy in office notice to property owners of approval of utility installation after 2 years. c) Destroy in office remaining records after reference value ends.± Agency Policy: Destroy in office after <u>3 years.</u>	
18.28	UTILITIES: PUBLIC UTILITIES INSPECTION FORMS Records relating to the inspection of sanitation, electric, water, gas and sewer utilities submitted to or conducted by agency.	Destroy in office when superseded or obsolete.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.29 	UTILITIES: PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR RECORDS Includes records documenting installation, authorizations to construct, building plans, location, specifications, and maintenance history, for hydrants, pipes, pumps, valves, and similar system equipment. Includes drainage system maintenance and repair records.	a) Retain in office as built plans and specifications for life of system and then destroy. b) Destroy in office 5 years after equipment is no longer owned and/or operational if unlike replacement occurred. c) Destroy in office 3 years after equipment is no longer owned and/or operational if like replacement occurred. d) Destroy in office background surveys, studies, reports, drafts, and other records when superseded or obsolete.	Authority: 15A NCAC 18C .0300 15A NCAC 2H .0115 Confidentiality: G.S. 132-1.7
18.30	UTILITIES: RECYCLING WATER RECORDS Backwash recycling groundwater records.	Destroy in office when superseded or obsolete.	Authority: 40 CFR 141.76(d)
18.31	UTILITIES: SERVICE INTERRUPTION RECORDS Includes reports, logs, or similar records documenting service interruptions.	Destroy in office after 3 years.*	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.32	UTILITIES: TAP AND HOOK UP RECORDS Applications, permits, contracts, logs, or similar records documenting location and installation of water and wastewater hookup and taps.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office denied applications and remaining records when reference value ends. ± Agency Policy: Destroy in office after <u>3 years.</u>	Confidentiality: G.S. 132-1.1(c)
18.33	UTILITIES: WATER AND WASTEWATER PERMITS AND APPROVAL RECORDS Permits, approval letters, and other related documentation required by local, state, or federal ordinance, regulation, or statute for systems owned or operated by agency. Includes records regarding National Pollutant Discharge Elimination System (NPDES) permits.	a) Retain approval letters and supporting documentation permanently. b) Destroy in office permits and other records 5 years after expiration, cancellation, revocation or denial.*	Retention: 15A NCAC 18C .0300 15A NCAC 2H .0115 40 CFR 122.28
18.34	UTILITIES: WASTEWATER MAINTENANCE OPERATION REPORTS	Destroy in office after 3 years.	

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.35	WATER QUALITY: LABORATORY OPERATIONS RECORDS Includes documentation of all analytical quality control practices, reporting units, forms, test methods, and related procedures pertaining to certification obtained by agency. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office samples, raw data, analysis reports and related documentation after 5 years.* b) Destroy in office records concerning certification 2 years after expiration, cancellation, revocation, or denial.*	Authority: 15A NCAC 02H .0805(7)(G) 15A NCAC 02H .1100
18.36	WATER QUALITY: PRETREATMENT PROGRAM RECORDS Includes annual pretreatment reports, records of monitoring activities and results, water quality records and other related documentation.	a) Destroy in office permits and supporting documentation 5 years after expiration, cancellation, revocation, or denial.* b) Destroy in office remaining records after 3 years.*	Retention: 15A NCAC 02H .0908(f)(1) 40 CFR 503.17
18.37	WATER QUALITY: PUBLIC WATER SANITARY SURVEY RECORDS Includes reports, summaries, studies, correspondence (including e-mail), and other related records documenting the sanitary condition of system. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	a) Destroy in office 10 years after completion of survey.* b) Destroy in office documentation of corrective measures 2 years after their implementation.	Retention: 40 CFR 141.33 15A NCAC 18C .1526

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ITEM #	STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
18.38	WATER QUALITY: SEWER JETTING AND VECTORING RECORDS Records documenting the routine cleaning of wastewater lines.	Destroy in office after 3 years.	
18.39	WATER QUALITY: SLUDGE TREATMENT RECORDS Includes analyses, certification statements, site restrictions, monitoring records, vector attraction reduction requirements, trip tickets, residual records, control plans and other related documentation conducted by or for agency.	Destroy in office after 5 years.*	Retention: 40 CFR 503.17
18.40	WATER QUALITY: STORMWATER DEVIATION PERMITS Permits issued to single lots. Includes applications, certifications of installations, and related records.	a) Destroy in office permits and contracts 3 years after termination or cancellation.* b) Destroy in office inspections submitted by owner when superseded or obsolete.	
18.41	WATER QUALITY: VIOLATION RECORDS Includes all documentation of actions taken to correct federal, state or local violations of water and wastewater management standards by agency.	Destroy in office after 5 years.*	Retention: 40 CFR 141.33 15A NCAC 18C .1526
18.42	WATER QUALITY: WATER AND WASTEWATER SYSTEM INSPECTIONS AND TESTS Includes non-compliance inspections and test records conducted by a facility.	Destroy in office after 5 years.	

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STANDARD 19: PROGRAM OPERATIONAL RECORDS – STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS

Official records and materials created and accumulated for constructing and maintaining municipal and county-maintained streets and other public works projects, and engineering records.

ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.01	APPRAISAL REPORTS Records appraising privately owned land for compensation in eminent domain projects. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 10 years.	
19.02	CEMETERY DEEDS Copies of deeds for the purchase of agency-owned cemetery plots. Includes applications or deed slips.	a) Retain 1 copy of deed in office permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>1 year</u>	
19.03	CEMETERY INTERMENT RECORDS Includes name of deceased, date of interment, and location of plot.	Retain in office permanently. <i>Retention Note: If these records are maintained as an electronic database, a copy should be maintained on paper or microfilm and updated regularly.</i>	


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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.04	EXCAVATION PERMITS Applications, permits, and billing information for individuals and contractors requesting to work in the county or municipal right-of-way for demolitions or excavations.	a) Destroy in office billing records after 3 years.* b) Destroy in office applications and permits 1 year after expiration. c) Destroy in office applications for which a permit was never issued when reference value ends.± Agency Policy: Destroy in office after : <u>3 years</u>	
19.05	GRAVE OPENING ORDERS Authorizations to dig graves in agency-owned cemeteries.	Destroy in office after 1 year.	
19.06	INFRASTRUCTURE MAINTENANCE RECORDS Records documenting the general maintenance and upkeep of infrastructure, including roads, traffic lights, and other public works.	Destroy in office after 3 years.	
19.07	PLANNING FILE Includes long-range and immediate plans for paving streets and other projects.	Destroy in office 5 years after superseded or obsolete.	
19.08	 PROJECT RECORDS - CANCELLED Background information for public works and engineering projects explored but not undertaken. Records are used as a reference file and include maps, project information, and the reason that the project failed.	a) Retain records with historical value permanently. b) Destroy in office remaining records when reference value ends.± Agency Policy: Destroy in office after <u>5 years</u>	Confidentiality: G.S. 132-1.7


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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.09 	PROJECT RECORDS – CORE Records used to document the design and construction of public works and engineering projects. Includes final as-built plans and specifications; certificate of completion/closure; policy correspondence (including e-mail), covenants; final estimates and budgetary summaries; geo-technical reports; environmental mitigation agreements; permits for right-of-way use, photographs documenting key aspects of construction as-built; final specifications; and as-built structural calculations.	Destroy originals after life of structure ends.	Confidentiality: G.S. 132-1.7

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.10 	<p>PROJECT RECORDS – ENGINEERING & COMPLIANCE Records used to document the engineering and technical areas of a public works and engineering project, as well as compliance with regulatory requirements. Includes superseded plans and specifications, agreements for construction and finance, billing information, change orders, force orders, work orders, construction claims, contract documentation, contracts, reports, diaries and narratives, EEO information, material certifications, material testing reports, notice to proceed, permit of entry, postings, pre-construction conference records, final progress payments, punch lists, regulations, shop drawings, and subcontractor information. File also includes environmental review records and proof of compliance with any mitigation measures required as a condition of project authorization.</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Grants: Financial (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS); GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.)</p>	Destroy in office 6 years after completion or termination of project.*	Confidentiality: G.S. 132-1.7


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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.11	PROJECT SHEETS FILE Local forms listing property owners, lot or tract size, right-of-way data, tax value, and compensation.	Destroy in office after 5 years.	
19.12	RIGHT-OF-WAY ACQUISITION WORKING RECORDS Includes records of negotiations on acquisition of rights-of-way related to public works and engineering projects, such as 10-day letter of notification, notification of intent to acquire, notice of condemnation action, and other correspondence (including e-mail) relating to right-of-way acquisitions. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	Destroy in office after 3 years.*	
19.13	STREET NAME AND HOUSE NUMBER FILES Records relating to the assignment of street names and house numbers. May also include records documenting street name changes, and non-temporary street openings and closings.	Retain in office permanently.	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.14 	STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS Records used for maintenance, review, and analysis of permanent and temporary structures owned by third parties that extend, cross or abut the public right-of-way. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Blueprints and Specifications (STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS).	Destroy records pertaining to structure 3 years after the end of life of the structure.	Confidentiality: G.S. 132-1.7
19.15	SURVEY FIELD RECORDS Records used to document and establish easements and rights-of-way, and to locate reference points used during street and utility projects. Records include traverse information, tie sheets, sketches, field notes, plats, interpretation of field notes, alignments, profiles of projects, plans, grade sheets, estimates, databank ties, and other miscellaneous documents used to establish grades, rights-of-way and easements. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Easements and Right-of-Way Agreements (STANDARD 6: LEGAL RECORDS).	a) Retain records with historical value permanently. b) Destroy in office remaining records when superseded or obsolete.	
19.16	TRAFFIC ANALYSIS Analysis of vehicle traffic within agency jurisdiction.	Destroy in office after 5 years.	

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ITEM #	STANDARD 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
19.17	TRAFFIC VIDEO RECORDINGS AND DATA Recordings and other data used to monitor traffic levels.	Destroy in office after 30 days.*	


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STANDARD 20: PROGRAM OPERATIONAL RECORDS - LAW ENFORCEMENT RECORDS (EXCLUDING SHERIFF'S OFFICES)



Records received and created by any local government law enforcement agency (excluding sheriff's offices) necessary to meet all statutory requirements. Comply with applicable provisions of G.S. §132-1.4 regarding confidentiality of law enforcement records and G.S. §153A-98 and G.S. §160A-168 regarding confidentiality of personal information of law enforcement officers.

Please note: Records created by county sheriff's offices fall under the purview of the Records Retention Schedule of County Sheriff's Offices.

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.01	ALARM CALL REPORTS Reports completed by officers responding to alarm calls. Includes listings of alarm type, time received, time arrived, reason for activation, and other related information. Includes forms completed by businesses and residences naming emergency contacts, location of safe, or other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	
20.02	ALTERNATIVE SENTENCING PROGRAMS Records documenting alternative sentencing programs. Includes work release and weekender service.	Destroy in office 3 years after individual leaves program.	
20.03	 ARREST PROCESSING RECORDS Records used to track a defendant's time and activities while in arrest processing. Includes time of arrival and time to and from each workstation.	Destroy in office 1 year after date of arrest.*	Confidentiality: G.S. 132-1.4



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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.04 	ARREST REPORTS Reports concerning arrests made by officers.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 5 years from date of arrest if report is not made part of a case file.	Confidentiality: G.S. 132-1.4
20.05	AUCTION RECORDS Records concerning abandoned and unclaimed articles or found property in possession of law enforcement sold at public auction. May include auction receipts of monies received for items sold.	Destroy in office after 3 years.*	
20.06 	CASE FILE: FELONIES Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure report, statements of seized and returned property, interview sheets; case status reports, photographs, court orders, correspondence; officer's notes, court dispositions, audio or video recordings, and other related records. SEE ALSO: Electronic Recordings of Interrogations, below.	a) Destroy in office records concerning solved cases 20 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved cases until solved, and then follow disposition instructions in part (a).	Confidentiality: G.S. 132-1.4



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± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.07 	CASE FILE: MISDEMEANORS Includes investigative reports, complaint reports, fingerprint cards, original arrest reports, copies of warrants, special expenditure reports, statements of seized and returned property, interview sheets, case status reports, photographs, court orders, correspondence, officer's notes, court dispositions, audio or video recordings, and other related records.	a) Destroy in office records concerning solved malicious misdemeanor cases 3 years after disposition of case and exhaustion of any appeals.* b) Retain in office records concerning unsolved malicious misdemeanor cases until solved, and then follow disposition instructions in part (a). c) Destroy in office records concerning all misdemeanor cases not covered in (a) or (b) after 3 years.*	Confidentiality: G.S. 132-1.4
20.08 	COMMUNICATION RECORDS Recordings, printouts, and logs of telephone, radio, dispatch, 911 emergency calls or texts, and computer aided dispatch (CAD) systems incoming and/or outgoing communications. Includes time and date of call, contents of call, location of call, name of unit sent to scene, and other related information. SEE ALSO: PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, 911 Communication Records and Recordings AND Dispatch Records and Recordings.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.09 	COMPLAINTS Records concerning complaints to which a unit responded. Includes logs listing name and address of victim, time, date, nature of complaint, responding officer's name, action taken, and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 3 years after resolution if not made part of a case file.	Confidentiality: G.S. 132-1.1(a)
20.10	COMPOSITE INTERVIEWS Summaries of interviews used to determine the physical description of suspects.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>n/a</u>	
20.11 	CRIME ANALYSIS RECORDS Records used to anticipate, prevent, or monitor possible criminal activity. Includes crime reports, photographs, complaints, copies of citations, criminal profile information, and interoffice memoranda generated or accumulated in connection with investigations or directed patrols.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u>n/a</u>	Confidentiality: G.S. 132-1.4 G.S. 132-1.7(a2) Authority/ Confidentiality/ Retention 28 CFR 23.20

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.12 	DETENTION FACILITY INCIDENT REPORTS Detention facility incident reports. Include narratives of incidents, lists of those involved, statements and interview reports, inmates' refusal of medical treatment, inmates' refusal to press charges, and other related records. SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Litigation Case Records (STANDARD 6: LEGAL RECORDS).	c) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors d) Destroy in office after 3 years if not made part of a case file.*	Confidentiality: G.S. 132-1.1(a)
20.13	DETENTION FACILITY OPERATIONAL RECORDS Records concerning all activities occurring during shifts at detention facilities. Includes end of duty (shift change reports, key and radio control lists, equipment and inmate/non-inmate housing check lists, cell inspection reports, laundry exchange and controlled property lists, tour reports, etc.) and inmate accountability (rosters, commitment and release reports, cell locations, etc.) records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u> n/a </u>	
20.14	DETENTION FACILITY PHYSICAL FORCE RECORDS Reports made by any officer or employee of a detention facility who applies physical force to an inmate or arrestee.	Destroy in office after 3 years.*	


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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.15	DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) ENTRIES Records and logs listing entries and inquiries made against DCI-NCIC networks and concerning missing persons, wanted persons, stolen vehicles or other property, and other related topics.	Destroy in office 1 year after period covered by audit.*	Authority: 28 USC 534
20.16	DIVISION OF CRIMINAL INFORMATION AND NATIONAL CRIME INFORMATION CENTER (DCI-NCIC) VALIDATION RECORDS Requests and proofs of verification for DCI-NCIC or other law enforcement information networks.	Destroy in office after 1 year.*	Authority: 28 USC 534
20.17	DNA SAMPLING RECORDS Records documenting the collection of DNA samples from persons for qualifying offenses. Includes copies of judgments. Original samples are forwarded to the State Crime Lab.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 1 year from date sample was obtained if not made part of a case file.	Authority: G.S. 15A-266.8



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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.18 	DOMESTIC VIOLENCE RECORDS Restraining orders and related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after expiration of restraining order if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.19	DRUG AND ALCOHOL TESTING RECORDS Records and reports generated when individuals suspected of being under the influence of or impaired by illegal drugs or alcohol are chemically tested. Includes reports used for persons arrested for driving while impaired by alcohol and/or drugs and breathalyzer analysis reports. SEE ALSO: Laboratory Case Records, below.	a) Transfer original Driving While Impaired (DWI) reports to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u> n/a </u>	


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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.20 	ELECTRONIC RECORDINGS OF INTERROGATIONS Electronic recordings generated by audio and/or video recording devices of custodial interrogations in an investigation of a juvenile or any person in a criminal investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after _____ n/a _____	Authority: G.S. 15A-211 Confidentiality: G.S. 7B-3001(b) G.S. 132-1.4A
20.21 	FIELD OBSERVATIONS Records concerning field observations of suspicious persons or vehicles. Includes subject's name, address, and physical description; date, time, and location of occurrence; reason for stop; name of officer conducting interview; and other related information.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after _____ n/a _____	Confidentiality: G.S. 132-1.4


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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.22	 FINGERPRINT CARDS Records used to verify a subject's identity. Includes fingerprints and all necessary information required to identify an individual. Also includes records of latent finger and palm prints that were found at the scene of a crime without identification of suspects <i>Original fingerprint records are forwarded to the State Bureau of Investigation.</i> SEE ALSO: Juvenile Case History Identification Records, below.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of case file.	Confidentiality: G.S. 132-1.4 Authority: G.S. 15A-502
20.23	FORCIBLE ENTRY RECORDS Records concerning forcible entries made by law enforcement personnel.	Destroy in office after 1 year.	
20.24	FUGITIVE WARRANTS CASE RECORDS Records concerning fugitive warrants sent to a department from another jurisdiction requesting assistance in finding an individual. Includes fugitive profile and warrant.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after _____ n/a	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.25 	IDENTIFICATION PHOTOGRAPHS Photographs (mugshots) of persons arrested in association with formal investigations. Also includes driver's license photos or negatives. SEE ALSO: Juvenile Case History Identification Records, below.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of a case file.	Confidentiality: G.S. 132-1.4
20.26	INCIDENT RESPONSE REPORTS Reports completed by officers responding to incidents. Includes victim, suspect, and witness information; damaged and stolen property reports; statement sheets; Miranda waiver forms; and other related records.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of case file.± Agency Policy: Destroy in office after <u> n/a </u>	Confidentiality: G.S. 132-1.4
20.27	INMATE CLASSIFICATION RECORDS Records concerning classification information gathered by the detention facility while inmates are incarcerated. Also includes incident reports, behavioral or disciplinary reports, interviews, classification level assigned, requested housing moves, and other related records.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.28	INMATE COMMITMENT RECORDS Copies of judgment and commitment papers received from the Clerk of Superior Court's office used to validate time spent incarcerated.	Destroy in office when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u>	
20.29	INMATE DEATH REPORTS Reports filed by office upon the death of an inmate. A report must be sent to the county health director and N.C. Department of Health and Human Services, within five days of the death.	Destroy in office after 3 years.*	Authority: G.S. 153A-224(b)
20.30	INMATE FINANCIAL RECORDS Records concerning individual inmate funds maintained by a detention facility for use by the inmate while incarcerated. Includes balance sheets listing inmate's name and number, amount of funds, dates of deposits and withdrawals, and other related information.	Destroy in office 3 years after inmate is released or transferred from the facility.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.31 	INMATE GRIEVANCE RECORDS Records concerning grievances filed by inmates and actions taken.	a) If legal action is taken and case adjudicated, destroy in office 5 years after final disposition. b) If legal action is taken and case non-adjudicated (out-of-court claims), destroy in office 5 years after final disposition or expiration of relevant statute of limitations. c) Destroy remaining records in office 3 years after inmate is released or transferred from the facility.*	Confidentiality: G.S. 132-1.1(a)
20.32	INMATE MAIL, TELEPHONE, OR VISITOR RECORDS Records concerning telephone calls and mail sent and received by inmates and individuals visiting inmates confined in county or municipal detention facilities. Includes logs listing inmate's name, date and time of call or mail, visitor's signature and address, and other related information.	Destroy in office after 1 year.*	
20.33	INMATE MEAL RECORDS Records concerning the planning and scheduling of inmate meals. Includes food service daily shift reports, daily meal sheets, food order forms, kitchen checklists, lists of inmates receiving meals and other related records. File also includes records concerning requests for special diets made by inmates.	Destroy in office after 3 years.*	Retention: 10A NCAC 14J .1723

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.34	INMATE MEDICAL RECORDS Records concerning medical examinations, diagnoses, and treatments of inmates. Includes medical information sheets and screening forms, medical histories as provided by inmate, receipt and/or release forms for medications and medical articles, laboratory and x-ray reports, blood pressure records, sick bay transfer forms, special diet authorizations, psychological evaluation forms, suicide watch sheets, progress notes, health assessment forms, dental forms, doctors' orders, transportation records to outside clinics or hospitals, and other related records. May also include authorization records for release of medical information to detention facility staff, informed consent forms, refusal of treatment forms, and release of financial responsibility forms. SEE ALSO: Juvenile Detention Records, below.	Destroy in office 10 years after inmate's release or parole.	Confidentiality: G.S. 8-53 45 CFR 164.502
20.35	INMATE PERSONAL IDENTIFICATION RECORDS Records concerning changes to be made to an inmate's incarceration file. Includes personal identification changes, superior court calendar, long form dismissals and other related records.	Destroy in office 30 days after receipt.*	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.36	INMATE RESEARCH REQUESTS Requests filed by inmates seeking use of a facility's law library or similar collection containing research materials.	Destroy in office 1 year from date of request.	
20.37 	JUVENILE CASE FILES Includes incident and arrest reports, detention orders, disposition instructions, name and address of person having legal and/or physical custody of child, correspondence with county, municipal, or state juvenile services, and other related records.	a) Destroy in office records when juvenile reaches 21 years of age if adjudicated for an offense that would have been a Class A, B1, B2, C, D, or E felony if committed by an adult. b) Destroy in office records related to all other cases when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b) Retention:
20.38 	JUVENILE CASE HISTORY IDENTIFICATION RECORDS Includes fingerprints and photographs.	a) Transfer to the State Bureau of Investigation and Federal Bureau of Investigation. b) Destroy in office agency copies when reference value ends.*± Agency Policy: Destroy in office after <u> n/a </u>	Confidentiality/ Retention: G.S. 7B-2102
20.39 	JUVENILE DETENTION RECORDS Records concerning medical and non-medical information gathered on juvenile inmates held in county or municipal detention facilities.	a) Destroy in office medical records when juvenile reaches 30 years of age. b) Destroy in office non-medical records when juvenile reaches 18 years of age.	Confidentiality: G.S. 7B-3001(b)

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.40 	LABORATORY CASE RECORDS Records concerning cases examined in a crime laboratory; includes reports, notes, charts, and other related records	Retain in office permanently.	Confidentiality: G.S. 132-1.4
20.41 	LAW ENFORCEMENT AUDIO AND VIDEO RECORDINGS Tapes and digital recordings generated by mobile and fixed audio and video recording devices. Does not include Electronic Recordings of Interrogations, above.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 30 days if not made part of a case file.	Confidentiality: G.S. 132-1.4A G.S. 153A-98
20.42	MULTIPLE FIREARMS SALES REPORTS Reports received from dealers reporting the sale of multiple firearms.	Destroy in office when reference value ends, but within 20 days after receipt.± Agency Policy: Destroy in office after <u> n/a </u>	Retention: 18 USC 923(g)(3)(b)
20.43	MULTIPLE FIREARMS SALES REPORTS DESTRUCTION RECORDS Records submitted after 6 months to the U.S. Attorney General's Office certifying that all multiple firearm sales reports received from dealers have been destroyed.	Destroy in office after 1 year.	Authority: 18 USC 923(g)(3)(b)

20. Law Enforcement Records

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.44	ORDINANCE VIOLATIONS CITATIONS Citations issued for violations of municipal and county ordinances.	Destroy in office after 3 years.*	
20.45	PAWNSHOP RECORDS Pawnshop cards and property records submitted to municipal and county law enforcement offices.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	Authority: G.S. 66-391
20.46	PERMISSION TO SEARCH RECORDS Authorizations for officers to search property, and if necessary, confiscate property deemed pertinent to an investigation.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office when reference value ends if not made part of a case file.± Agency Policy: Destroy in office after <u> n/a </u>	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.47 	PERMITS: CONCEALED WEAPONS AND HANDGUNS Applications and supporting documentation filed to carry concealed weapons or purchase handguns. Includes background checks and other related records.	a) Destroy in office all approved applications after 5 years. b) Destroy in office denied applications and related records 5 years from date of denial or resolution of petition filed with district court, whichever is longer. c) Destroy in office background checks and related records concerning approved applications when permit is issued.	Authority/ Confidentiality: G.S. 14-415.17 G.S. 132-1.4 G.S. 132-1.7
20.48	PRISON RAPE ELIMINATION ACT (PREA) FILE Allegation, investigation, and incident review records documenting investigations into allegations of sexual abuse or sexual harassment.	Destroy in office 6 years after inmate's release.* <i>Retention Note: If a minor is involved in the incident, records should be retained until the minor reaches age 30.</i>	Authority: 28 CFR Part 115
20.49	PRISON RAPE ELIMINATION ACT (PREA) DATA FILE Aggregated data for every allegation of sexual abuse at county or municipal lockups.	Destroy in office after 10 years.	Authority/Retention: 28 CFR Part 115.187 28 CFR 115.189(d)
20.50	PRISONER TRANSPORT RECORD Verification forms completed by receiving party of prisoner patient.	Destroy in office after 1 year.	

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2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.51	PROPERTY RECORDS Records concerning confiscated property, evidence, stolen or recovered property, and unclaimed property. Includes descriptions of property and its value, serial numbers, and other related records. Records may also be filed with original incident report.	Destroy in office 3 years after final disposition of property.	
20.52	PURSUIT LOGS Logs concerning pursuits by law enforcement personnel.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 3 years if not made part of a case file.	
20.53	RIDE-ALONG PROGRAM RECORDS Records concerning a law enforcement ride-along program.	Destroy in office after 3 years.*	
20.54	SEXUAL OFFENDER RECORDS Records concerning sexual offenders living within jurisdiction.	a) Destroy in office records of persons registered in the "Sexually Violent Predator Program" when individual is known dead or after 90 years. b) Destroy in office records of persons registered in the "Sex Offender and Public Protection Program" after court petition and review by the state; or after 30 years or length of court order, whichever is greater; or when individual is known dead.	Authority: G.S. 14-208 Retention: G.S. 14-208.6A

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.55	TRAFFIC ACCIDENT REPORTS Records concerning traffic accidents. Includes general correspondence, property receipts, collision reports, waivers signed by involved parties agreeing to settle damages among themselves, and other related records.	a) Transfer original collision report to the N.C. Division of Motor Vehicles within 10 days of accident. b) Destroy in office after 3 years records concerning accidents not meeting N.C. Division of Motor Vehicles reporting requirements, but for which a report was made. c) Destroy in office duplicate reports when reference value ends.± Agency Policy: Destroy in office after <u> n/a </u>	Confidentiality: 18 USC 2721
20.56 	TRAFFIC CITATIONS AND WARNINGS Citations issued to drivers violating motor vehicle and traffic laws. Includes voided citations and warnings that do not require a fine or court appearance.	a) Transfer original citations to county Clerk of Superior Court's office. b) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors c) Destroy remaining records in office after 1 year.	

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ITEM #	STANDARD 20: LAW ENFORCEMENT RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
20.57	TRESPASS RECORDS Authorizations by property owners, lessees, or managers for law enforcement officers to take action deemed appropriate to remove unauthorized persons and issue trespass warnings.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office 1 year after expiration if not made part of a case file.	Authority: G.S. 14-159.12-13
20.58	VEHICLE TOWING RECORDS Includes recovery authorizations and consent forms completed by owners to have vehicle towed, removed, stored, or left at the scene.	a) If records are made part of a case file, follow disposition instructions for: Case File: Felonies Case File: Misdemeanors b) Destroy in office after 1 year if not made part of a case file.	

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STANDARD 21: PROGRAM OPERATIONAL RECORDS - TAX RECORDS (FOR MUNICIPALITIES)

Records received and created by a municipality for the purposes of collecting taxes. For County Tax Administration records, please refer to the separate County Tax Administration Program Schedule.

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.01 	ANIMAL LICENSING RECORDS Records concerning the licensing of dogs, cats, and other animals by the municipality. Includes owner and animal information and record of fees paid.	Destroy in office after 3 years.*	Authority: G.S. 160A-212 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.02	BEER AND WINE TAXES AND RECORDS Records concerning the levy of privilege taxes on beer and wine.	Destroy in office after 3 years.*	Authority: G.S. 105-133.77-79
21.03 	BICYCLE LICENSE PLATE RECORDS Records concerning issuance of license plates for bicycles.	Destroy in office after 1 year.*	Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.


2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.04	DELINQUENT TAXPAYER RECORDS Records concerning taxpayers who have not paid real and personal property taxes due, including unpaid notices. SEE ALSO: Delinquent Taxpayer Records: Advertisement of Tax Liens Against Real Property, below.	Destroy in office after 10 years or 3 years after final settlement or 1 year after released by governing board, whichever comes first.*	
21.05	DELINQUENT TAXPAYER RECORDS: ADVERTISEMENT OF TAX LIENS AGAINST REAL PROPERTY Records concerning the municipal taxation officer's publication in the newspaper of delinquent taxpayer and tax sales notices. SEE ALSO: Delinquent Taxpayer Records, above.	Destroy in office after 10 years.*	Authority: G.S. 105-369
21.06	MOTOR VEHICLE RENTAL TAX RECORDS Records concerning motor vehicle rental tax assessments.	Destroy in office after 3 years.*	
21.07	MUNICIPAL VEHICLE TAX RECORDS Records concerning municipal vehicle taxes levied annually.	Destroy in office after 3 years.*	Authority: G.S. 20-97(b)
21.08	PREPARED FOOD AND BEVERAGE TAX RECORDS Records concerning prepared food and beverage tax assessments.	Destroy in office after 3 years.*	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES


ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.09	PRIVILEGE LICENSES, TAXES, AND FEE RECORDS Records concerning the licensing of occupations, businesses, trades, professions, and forms of amusement or entertainment and associated fees and taxes. SEE ALSO: Animal Licensing Records (above), Beer and Wine Taxes and Records (above), Municipal Vehicle Tax Records (above), Taxicab and Limousine Tax Records (below).	Destroy in office after 3 years.*	Authority: G.S. 160A-194
21.10 	ROOM OCCUPANCY TAX RECORDS Records concerning the administration of room occupancy tax records for those municipalities who have adopted room occupancy taxes.	Destroy in office after 3 years.*	Authority: G.S. 160A-215 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1

21. Tax Records (Municipal)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction “destroy when reference value ends.” Please use the space provided.

2021 PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.11	 SCHEDULE "B" LICENSES Receipts of licenses issued by municipality in accordance with Article 2, Schedule B of the Revenue Laws of North Carolina. Applies to privilege licenses issued to attorneys-at-law and other professionals, installment paper dealers, and pawnbrokers.	a) Destroy in office 3 years after close of license tax year stubs or detailed settlement records. b) Destroy in office stubs 1 years after audit if settlement records are kept.	Authority: G.S. 105-41 G.S. 105-83 G.S. 105-88 G.S. 153A-152 G.S. 160A-211 Confidentiality: G.S. 105-259 G.S. 132-1.1(b) G.S. 132-1.2 G.S. 160A-208.1
21.12	TAX ABSTRACTS AND LISTS Records concerning real and personal property in the municipality, based on assessment lists. Includes name and address of taxpayer along with descriptions of property owned and estimated value.	Destroy in office after 10 years or two revaluation cycles.	Authority: G.S. 105-309 G.S. 105-296
21.13	TAX EXEMPT PROPERTY FILE Records concerning property that is exempt from taxation.	Destroy in office 5 years after property exemption has expired or at end of life of structure, whichever comes first.	
21.14	TAX LEDGER CARDS OR SHEETS	Destroy in office 5 years after superseded or obsolete.	

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

ITEM #	STANDARD 21: TAX RECORDS		
	RECORDS SERIES TITLE	DISPOSITION INSTRUCTIONS	CITATION
21.15	TAX LEVY/SEIZURE RECORDS Inventory of property taken from property owner by the municipal tax collector to pay back taxes.	a) Destroy in office after 3 years execution forms if levy and sale of personal property is made. If levy and sale are conducted by municipal law enforcement agency, execution forms are to be retained by that agency. b) If levy, seizure, and sale are not made, destroy in office forms when reference value ends.± Agency Policy: Destroy in office after <u>n/a</u>	Authority: G.S. 105-366 G.S. 105-367
21.16	TAX LIEN SALES Records concerning sales held to satisfy tax liens.	Destroy in office 10 years after sale.	
21.17	TAX REBATES Records concerning tax rebates given or received.	Destroy in office after 10 years.	
21.18	TAX SCROLLS Records indicating property (real estate and personal) valuation and taxes due.	Destroy in office after 10 years.	
21.19	TAXICAB AND LIMOUSINE TAX RECORDS Records concerning the levy of privilege taxes on taxicabs and limousines.	Destroy in office after 3 years.*	Authority: G.S. 20-97(d)

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated. See AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION, page A-5.

± The agency hereby agrees that it will establish and enforce internal policies setting minimum retention periods for the records that Natural and Cultural Resources has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

MANAGING PUBLIC RECORDS IN NORTH CAROLINA

Q. What is this “records retention and disposition schedule”?

- A.** This document is a tool for the employees of local government agencies across North Carolina to use when managing the records in their offices. It lists records commonly found in agency offices and gives an assessment of their value by indicating how long those records should be retained. This schedule is also an agreement between your agency and the State Archives of North Carolina.

This schedule serves as the inventory and schedule that the State Archives of North Carolina is directed by N.C. Gen. Stat. § 121-5(c) and N.C. Gen. Stat. § 132-8 to provide. It supersedes all previous editions, including all amendments.

Q. How do I get this schedule approved?

- A.** This schedule must be approved by your governing body for use in your agency. That approval should be made in a regular meeting and recorded as an action in the minutes. It may be done as part of the consent agenda, by resolution, or other action.

Q. Am I required to have all the records listed on this schedule?

- A.** No, this is not a list of records you must have in your office.

Q. What is “reference value”?

- A.** Items containing “reference value” in the disposition instructions are generally records that hold limited value, which is typically restricted to those documenting routine operations within the office. A minimum retention period should be established by the office for any items containing the phrase “destroy in office when reference value ends” in the disposition instructions.

Q. Do the standards correspond to the organizational structure of my agency?

- A.** Records series are grouped into standards to make it easier for users to locate records and their disposition instructions. You may find that the groupings reflect the organizational structure of your agency, or you may find that records are located in various standards depending on the content of the record. The intent of the schedule’s organization is to provide an easy reference guide for the records created in your agency.

Q. What if I cannot find some of my records on this schedule?

- A.** Sometimes the records are listed in a different standard than how you organize them in your office. Be sure to check the Index and utilize the search function on the PDF version of the schedule to facilitate the location of records series. If you still cannot locate your records on the schedule, contact a Records Management Analyst. We will work with you to amend this records schedule so that you may destroy records appropriately. The Request for Change in Records Schedule form (see page A-17) can be used for such requests.

Q. What are public records?

- A.** The *General Statutes of North Carolina*, Chapter 132, provides this definition of public records:
- “Public record” or “public records” shall mean all documents, papers, letters, maps, books, photographs, films, sound recordings, magnetic or other tapes, electronic data-processing records, artifacts, or other documentary material, regardless of physical form or

characteristics, made or received pursuant to law or ordinance in connection with the transaction of public business by any agency of North Carolina government or its subdivisions. Agency of North Carolina government or its subdivisions shall mean and include every public office, public officer or official (state or local, elected or appointed), institution, board, commission, bureau, council, department, authority or other unit of government of the state or of any county, unit, special district or other political subdivision of government.

Q. *Is any person allowed to see my records?*

- A.** Yes, except as restricted by specific provisions in state or federal law. N.C. Gen. Stat. § 132-6 instructs:

“Every custodian of public records shall permit any record in the custodian’s custody to be inspected and examined at reasonable times and under reasonable supervision by any person, and shall, as promptly as possible, furnish copies thereof upon payment of any fees as may be prescribed by law. ... No person requesting to inspect and examine public records, or to obtain copies thereof, shall be required to disclose the purpose or motive for the request.”

Q. *What about my confidential records?*

- A.** Not all government records are open to public inspection. Exceptions to the access requirements in N.C. Gen. Stat. § 132-6 and the definition of public records in N.C. Gen. Stat. § 132-1 are found throughout the General Statutes. You must be able to cite a specific provision in the General Statutes or federal law when you restrict or deny access to a particular record.

Q. *Am I required to make available to the public copies of drafts that have not been approved?*

- A.** Yes, even if a report, permit, or other record has not been finalized, it is still a public record subject to request. Any record that is not confidential by law must be provided when a request is received, whether it is “finished” or not.

Q. *What do I do with permanent records?*

- A.** Permanent records should be maintained in the office that created the records, forever.

The Department of Natural and Cultural Resources (DNCR) is charged by the General Assembly with the administration of a records management program (N.C. Gen. Stat. § 121-4 (2) and § 132-8.1) and the maintenance of “*a program for the selection and preservation of public records considered **essential** to the operation of government and to the **protection of the rights and interests of persons**”* (§ 132-8.2). Permanent records with these characteristics require preservation duplicates that are human-readable (paper or microfilm). Some examples of these characteristics include:

- Affect multiple people, without regard to relation
- Have significance over a long span of time
- Document governance
- Document citizenship

Examples of records with these characteristics:

- Minutes of governing bodies at the state and local levels are the basic evidence of our system of governance, and are routinely provided for the public to read.

- Records, such as deeds and tax scrolls, about land document changes in ownership and condition. Counties maintain offices expressly for the purpose of making those records available to the public. Other records in local and state governments document potential public health hazards, such as hazardous materials spills.
- Adoptions, marriages, and divorces document changes in familial relationships and document citizenship. Though adoptions are confidential (not available for public inspection), they document citizenship and changes in inheritance and familial succession.
- Court records, such as wills, estates, and capital cases, affect people within and across family groups, are made available for public inspection, and often involve transactions related to the examples above.

See the Human-Readable Preservation Duplicates policy issued by the North Carolina Department of Natural and Cultural Resources (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/human-readable-preservation>) and check with a records analyst to determine whether your permanent records require a preservation duplicate.

Q. What is historical value?

- A.** Historical records document significant events, actions, decisions, conditions, relationships, and similar developments. These records have administrative, legal, fiscal, or evidential importance for the government or its citizens. Two criteria for determining historical value are inherent interest and extraordinary documentation:
- Inherent interest is created by non-routine events, by the involvement of famous parties, and by compelling contexts. For instance, foreclosure proceedings from the 1930s have high historical value because they date from the era of the Great Depression.
 - Extraordinary documentation is found in records that shed light on political, public, or social history. For instance, the records from the replevin case that returned the Bill of Rights to North Carolina hold more historical value than most property case files because of the political history intertwined with this case.

SANC has further elaborated selection criteria that help distinguish records with historical value:

- Do they protect the rights and property of citizens?
- Do they have a long-term impact on citizens?
- Do they document the core functions of an agency?
- Do they document high-level decision-making that shapes an agency's policies or initiatives?
- Do they summarize an agency's activities?

Call a Records Management Analyst for further assistance in assessing historical value.

Q. What if I do not have any records?

- A.** Nearly every position in government generates, receives, or uses records. Computer files of any kind, including drafts and e-mail, are public records. Even if your records are not the official or final version, your records are public records. Not all records have high historical, legal, or fiscal value, but they all must be destroyed in accordance with the provisions of the appropriate records schedule.

Q. I have a lot of unsorted records. What's a good first step for getting a handle on these records?

- A.** We encourage you to create a file plan of what records you have. When you create this plan, you can match each record to its placement on this schedule or on the appropriate retention schedule. A sample file plan is available on Page A-21. Having a file plan can help you strategize how to best organize your physical or digital records. A file plan is also useful in disaster planning and scheduling destructions.

Q. May I store our unused records in the basement, attic, shed, etc.?

- A.** Public records are public property. Though we encourage agencies to find places to store records that do not take up too much valuable office space, the selected space should be dry, secure, and free from pests and mold. Your office must ensure that records stored away from your main office area are well protected from natural and man-made problems while remaining readily available to your staff and the public.

Q. Our old records are stored in the attic, basement, or off-site building, etc. Are we required to provide public access to these records?

- A.** Yes, as long as the records are not confidential by law. You should also be aware that confidentiality can expire.

Q. Aren't all our old records at the State Archives of North Carolina?

- A.** Probably not. The State Archives of North Carolina collects only very specific types of records from local government offices. Contact a Records Management Analyst for more information about which records are held or can be transferred to the State Archives of North Carolina for permanent preservation.

Q. I found some really old records. What should I do with them?

- A.** Call a Records Management Analyst. We will help you examine the records and assess their historical value.

Q. Can I give my old records to the historical society or public library?

- A.** Before you offer any record to a historical society, public library, or any other entity, you must contact a Records Management Analyst. Permanent records must be kept either in your offices or at the State Archives of North Carolina.

Q. Whom can I call with questions?

- A.** If you are located west of Statesville, call our Western Office in Asheville at (828) 250-3103. If you are east of Statesville, all the way to the coast, call our Raleigh office at (919) 814-6900.

AUDITS, LITIGATION, AND OTHER OFFICIAL ACTION

Q. Why is there an asterisk in the disposition instructions of so many items on this schedule?

A. No record involved in a pending or ongoing audit, legal, or other official action may be destroyed before that audit or action is resolved.

A legal hold or litigation hold means that records that are the subject of the legal hold or litigation hold must be preserved and thus must not be destroyed until officially released from the hold. A legal hold or litigation hold is placed when either an official discovery order is served on the agency requesting the production of the records in question (for a litigation, regulatory investigation, audit, open records request, etc.) or litigation is pending and the agency is thus on notice to preserve all potentially relevant records. You must also ensure that for a claim or litigation that appears to be reasonably foreseeable or anticipated but not yet initiated, any records (in paper or electronic formats) relevant to such a claim or litigation are preserved and not destroyed until released by your General Counsel. The records in question must not be destroyed until the completion of the action and the resolution of all issues that arise from it regardless of the retention period set forth in this schedule.

We have used an asterisk (*) in the disposition instructions to mark records series that are commonly audited, litigated, or may be subject to other official actions. However, any record has this potential. Records custodians are responsible for being aware of potential actions, and for preventing the destruction of any record that is, or may be reasonably expected to become, involved in an audit, legal, or other official action.

Records used during routine audits may be destroyed when the governing body accepts the audit, if the records have completed the retention period listed in this schedule. If time remains in the retention period, the records must be maintained for the remainder of the period. The auditor's working papers must be kept according to the schedule. (See also GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Audits: Performance, STANDARD 1: ADMINISTRATION AND MANAGEMENT RECORDS, Audits: Financial, STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS.) Should a dispute arise over an audit, the records that were audited should be retained until that dispute is resolved.

The attorney representing the agency should inform records custodians when legal matters are concluded and records will no longer be needed. Following the conclusion of any legal action, the records may be destroyed if they have met the retention period in the schedule. Otherwise, they should be kept for the remaining time period.

TRANSITORY RECORDS

Transitory records are defined as “record[s] that [have] little or no documentary or evidential value and that need not be set aside for future use.”³

According to North Carolina General Statutes § 121 and § 132, every document, paper, letter, map, book, photograph, film, sound recording, magnetic or other tape, electronic data processing record, artifact, or other documentary material, regardless of physical form or characteristics, made or received in connection with the transaction of public business by any state, county, municipal agency, or other political subdivision of government is considered a public record and may not be disposed of, erased, or destroyed without specific approval from the Department of Natural and Cultural Resources.

The Department of Natural and Cultural Resources recognizes that some records may have little or no long-term documentary or evidential value to the creating agency. These records are often called “transitory records.” The following questions and answers discuss types of transitory records commonly created in state government. They may be disposed of according to the guidance below. However, all public employees should be familiar with the General Records Schedule for Local Government Agencies, their office’s Program Records Retention and Disposition Schedule, and any other applicable guidelines for their office. If any of these documents require a different retention period for these records, follow the longer of the two retention periods. When in doubt about whether a record is transitory, or whether it has special significance or importance, retain the record in question and seek guidance from the analyst assigned to your agency.

Q. What do I do with routing slips, fax cover sheets, “while you were out” slips, memory aids, etc.?

- A.** Routing slips and transmittal sheets adding no information to that contained in the transmitted material have minimal value after the material has been successfully transmitted. These records may be destroyed or otherwise disposed of after receipt of the material has been confirmed.

Similarly, “while you were out” slips, memory aids, and other records requesting follow-up actions (including voicemails) have minimal value once the official action these records are supporting has been completed and documented. Unless they are listed on the General Records Schedule for Local Government Agencies or your office’s Program Records Retention and Disposition Schedule, these records may be destroyed or otherwise disposed of once the action has been resolved.

Q. What about research materials, drafts, and other working papers used to create a final, official record?

- A.** Drafts and working papers are materials, including notes and calculations, gathered or created to assist in the creation of another record. All drafts and working papers are public records subject to all provisions of General Statute § 132, but many of them have minimal value after the final version of the record has been approved, and may be destroyed after final approval, if they are no longer necessary to support the analysis or conclusions of the official record. Drafts and working documents which may be destroyed after final approval include:

- Drafts and working papers for internal and external policies

³ Society of American Archivists, *Dictionary of Archives Terminology*.

- Drafts and working papers for internal administrative reports, such as daily and monthly activity reports
- Drafts and working papers for internal, non-policy-level documents, such as informal workflows and manuals; and
- Drafts and working papers for presentations, workshops, and other explanations of agency policy that are already formally documented.

Q. What if I have forms designed and used solely to create, update, or modify records in an electronic medium?

- A.** If these records are not required for audit or legal purposes, they may be destroyed in office after completion of data entry and after all verification and quality control procedures. However, if the forms contain any analog components that are necessary to validate the information contained on them (e.g. a signature or notary's seal), they should be retained according to the disposition instructions for the records series encompassing the forms' function.

See also the State Archives of North Carolina's guidance on digital signatures found at: <https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines/digital-signature-policy>

DESTRUCTION OF PUBLIC RECORDS

Q. When can I destroy records?

- A.** Each records series listed on this schedule has specific disposition instructions that indicate how long the series must be kept in your office. In some cases, the disposition instructions are “Retain in office permanently,” which means that those records must be kept in your offices forever.

Q. How do I destroy records?

- A.** After your agency has approved this records retention and disposition schedule, records should be destroyed in one of the following ways:
- 1) burned, unless prohibited by local ordinance;
 - 2) shredded, or torn so as to destroy the record content of the documents or material concerned;
 - 3) placed in acid vats so as to reduce the paper to pulp and to terminate the existence of the documents or materials concerned;
 - 4) sold as waste paper, provided that the purchaser agrees in writing that the documents or materials concerned will not be resold without pulverizing or shredding the documents so that the information contained within cannot be practicably read or reconstructed.

The provision that electronic records are to be destroyed means that the data, metadata, and physical media are to be overwritten, deleted, and unlinked so that the data and metadata may not be practicably reconstructed.

The data, metadata, and physical media containing confidential records of any format are to be destroyed in such a manner that the information cannot be read or reconstructed under any means.

— N.C. Administrative Code, Title 7, Chapter 4, Subchapter M, Section .0510

Without your agency’s approval of this records schedule, no records may legally be destroyed.

Q. How can I destroy records if they are not listed on this schedule?

- A.** Contact a Records Management Analyst. An analyst will discuss the nature of the records with you to determine if the records have historical value. If the records do have historical value, we will discuss the possibility of transferring the records to the State Archives of North Carolina to be preserved permanently.

If the records do not have historical value, we will ask you to complete a [Request for Disposal for Unscheduled Records](#) form if the records are no longer being created. If the records are an active records series, an analyst will help you develop an amendment to this schedule so that you can destroy the records appropriately from this point forward.

Q. *Am I required to tell anyone about the destructions?*

- A.** We recommend that you report on your records retention activities to your governing board on an annual basis. This report does not need to be detailed, but it is important that significant destructions be entered into the minutes of the Board. See a sample destructions log that follows (and is available online at the State Archives of North Carolina website, <https://archives.ncdcr.gov/government/rm-tools>).



Destructions Log

County/Municipality					
Division		Section		Branch	
Location(s) of Records					

[illegible]

ELECTRONIC RECORDS: E-MAIL, BORN-DIGITAL RECORDS, AND DIGITAL IMAGING

Q. When can I delete my e-mail?

- A.** E-mail is a public record as defined by N.C. Gen. Stat. § 121-5 and N.C. Gen. Stat. § 132. Electronic mail is as much a record as any paper record and must be treated in the same manner. **It is the content of each message that is important.** If a particular message would have been filed as a paper memo, it should still be filed (either in your e-mail program or in your regular directory structure), and it should be retained the same length of time as its paper counterparts. **It is inappropriate to destroy e-mail simply because storage limits have been reached.** Some examples of e-mail messages that are public records and therefore covered by this policy include:

- Policies or directives;
- Final drafts of reports and recommendations;
- Correspondence and memoranda related to official business;
- Work schedules and assignments;
- Meeting agendas or minutes
- Any document or message that initiates, facilitates, authorizes, or completes a business transaction; and
- Messages that create a precedent, such as issuing instructions and advice.

*From the Department of Cultural Resources E-Mail Policy (Revised July 2009),
available at the State Archives of North Carolina website*

Other publications (available online at the [State Archives of North Carolina website](#)) that will be particularly helpful in managing your e-mail include tutorials on managing e-mail as a public record and on using Microsoft Exchange.

Q. May I print my e-mail to file it?

- A.** We do not recommend printing e-mail for preservation purposes. Important metadata are lost when e-mail is printed.

Q. I use my personal e-mail account for work. No one can see my personal e-mail, right?

- A.** The best practice is to avoid using personal resources, including private e-mail accounts, for public business. N.C. Gen. Stat. § 132-1 states that records “made or received pursuant to law or ordinance *in connection with the transaction of public business* by any agency of North Carolina government or its subdivisions” are public records (emphasis added). The fact that public records reside in a personal e-mail account is irrelevant.

Q. We have an imaging system. Are we required to keep the paper?

- A.** You may scan any record, but you will need to receive approval from the Government Records Section in order to destroy paper originals that have been digitized. Your agency must develop an electronic records policy and then submit a Request for Disposal of Original Records Duplicated by Electronic Means. You can find these templates in the Digital Imaging section of the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines#digital-imaging>). Contact a Records Management Analyst for further instructions on how to develop a compliant electronic records policy.

Permanent records must have a security preservation copy as defined by State Archives of North Carolina's [Human-Readable Preservation Duplicate Policy](#) (N.C. Gen. Stat. § 132-8.2):

Preservation duplicates shall be durable, accurate, complete and clear, and such duplicates made by a photographic, photo static, microfilm, micro card, miniature photographic, or other process which accurately reproduces and forms a durable medium for so reproducing the original shall have the same force and effect for all purposes as the original record whether the original record is in existence or not. ... Such preservation duplicates shall be preserved in the place and manner of safekeeping prescribed by the Department of Natural and Cultural Resources.

The preservation duplicate of permanent records must be either on paper or microfilm.

Non-permanent records may be retained in any format. You will need to take precautions with electronic records that you must keep more than about 5 years. Computer systems do not have long life cycles. Each time you change computer systems, you must convert all records to the new system so that you can assure their preservation and provide access.

Q. Computer storage is cheap. Can I just keep my computer records permanently?

- A.** The best practice is to destroy all records that have met their retention requirements, regardless of format.

Q. What are the guidelines regarding the creation and handling of electronic public records, including text messages and social media?

- A.** There are numerous documents available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/digital-records/digital-records-policies-and-guidelines>). Topics covered include shared storage, cloud computing, e-discovery, trustworthy digital public records, digital signatures, e-mail, social media, text messages, websites, digital imaging, metadata, file formats, database indexing, and security backups.

Note that e-mail, text messages, and social media should be handled according to their content. Therefore, this schedule does not include a records series that instructs you on how to handle one of these born-digital records by format; instead of focusing on how the information is disseminated, consider what content is contained in the e-mail, text message, or social media post. For instance, an e-mail requesting leave that is sent to a supervisor should be kept for 3 years. On the General Records Schedule: Local Government Agencies, see Leave Records (Standard 4: HUMAN RESOURCES RECORDS).

GEOSPATIAL RECORDS

Q. Why should geographic information system (GIS) datasets be retained and preserved?

- A.** Geospatial records are public records and need to be retained and preserved based on their legal, fiscal, evidential and/or historical value according to an established retention schedule. Local agencies involved in GIS operations should work with the State Archives of North Carolina in order to appraise, inventory, and preserve their geospatial records according to established best practices and standards to insure both their short- and long-term accessibility.

Due to the complexity and transitory nature of these records, geospatial records retention and long-term preservation is a community-wide challenge. GIS files have become essential to the function of many local agencies and will continue to frequently be utilized in agency decision-making processes in the near and far future. Accessibility of GIS records over time has legal, fiscal, practical, and historical implications. The availability of GIS records can help safeguard the local government's legal and fiscal accountability and aid agencies in conducting retrospective and prospective studies. These studies are only possible when essential data from the past are still available.

Q. What GIS datasets should be preserved by local governments?

- A.** The following types of geospatial records have been designated as having archival value:
- Parcel data
 - Street centerline data
 - Corporate limits data
 - Extraterritorial jurisdiction data
 - Zoning data, address points
 - Orthophotography (imagery)
 - Utilities
 - Emergency/E-911 themes

For more information, see **GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, STANDARD 3: GEOGRAPHIC INFORMATION SYSTEM (GIS) RECORDS**.

Q. How often should we capture the datasets retained for their legal, fiscal, evidential or historical value?

- A.** Consult the retention schedule for frequency of capture. The frequency of capture is based on the significance of the record as well as its alterability.

Q. What data formats, compression formats, and media should be used to preserve the data?

- A.** Archiving practices should be consistent with North Carolina Geographic Information Coordinating Council (GICC) approved standards and recommendations. (Examples: Content Standards for Metadata; Data Sharing Recommendations). Consult the GICC website at <https://it.nc.gov/about/boards-commissions/gicc>.

You should also comply with guidelines and standards issued by the State Archives of North Carolina, which are available on its website.

Q. Who should be responsible for creation and long-term storage of archived data?

- A.** The creating agency, NCOneMap, and the State Archives of North Carolina may all have responsibility for archiving data. If you choose to upload your data to NCOneMap, consult with your county's GIS department to determine whether data will be uploaded by your agency or by the whole county. If you choose not to upload your data to NCOneMap, your agency must comply with standards (for metadata, file naming, data sharing, and long term preservation) and procedures adopted by the North Carolina Geographic Information Coordinating Council.

SECURITY PRESERVATION COPIES OF RECORDS

Q. What is the advantage to having security preservation copies of records stored with the State Archives?

- A.** Having duplicate copies of essential records in a separate location mitigates the risk that you may lose the only physical copy of a given record in a disaster or other records loss event. Maintaining offsite duplicates of records, regardless of format, is a good practice to adopt.

The State Archives creates duplicate copies on microfilm because of the durability of the medium. Silver negative microfilm does not decay for hundreds of years, ensuring that your records maintain their integrity over time.

Q. What records will the State Archives back up for us?

- A.** The State Archives provides security imaging services for minutes of major decision-making boards and commissions. We will also image records of adoptions for Social Services agencies as well as maps and plats from Registers of Deeds offices. Once those records are imaged, they are converted to security microfilm. We will store the silver negative (original) microfilm in our security vault. Contact the Records Management Analyst in charge of imaging coordination for the most current information.
-

Q. How do I start the process of backing up the above listed records?

- A.** We have three processes for creating backup film copies of these records. First, you can send photocopies of your approved minutes to us in the mail. Simply include a copy of the **Certification of the Preparation of Records for Security Preservation Copy** form (available online at the [State Archives of North Carolina website](#)) with each shipment. For more detailed instructions, contact a Records Management Analyst.

Secondly, you can bring us your original books. We will film them and return them to you. This process is most useful when you have more minutes to film than you are willing to photocopy. It is important to remember that a representative of your office or ours must transport the original books in person so that the custody of the records is maintained. You should not mail or ship your original minutes. Contact the Records Management Analyst in charge of imaging coordination to schedule an appointment for your books to be imaged. We will make every effort to expedite the filming so that your books will be returned to you as quickly as possible.

Finally, you can submit these records to the State Archives electronically. Please see our procedures in "[Transfer of Minutes in Digital Formats for Microfilming](#)" or contact the Records Management Analyst in charge of imaging coordination for more information.

Q. In the event of a records loss, how do I obtain copies of the security preservation copies stored at the State Archives?

- A.** Contact the Records Management Analyst in charge of imaging coordination who will help you purchase copies of the microfilm from our office. You can then send those reels to a vendor who can either make new printed books or scan the film to create a digital copy.

Q. Can I obtain digital copies of the security preservation records?

- A.** Yes, you can request digital copies of records when you submit them to the State Archives for initial reproduction. Contact the Records Management Analyst in charge of imaging coordination to initiate a request for digital duplicates.

DISASTER ASSISTANCE

Q. What should I do in case of fire or flood?

- A.** Secure the area, and keep everyone out until fire or other safety professionals allow entry. Then, call our Raleigh office at (919) 814-6903 for the Head of the Government Records Section or (919) 814-6849 for the Head of the Collections Management Branch. If you're in the western part of the state, call our Asheville Office at (828) 250-3103. On nights and weekends, call your local emergency management office.

DO NOT ATTEMPT TO MOVE OR CLEAN ANY RECORDS.

Damaged records are extremely fragile and require careful handling. Our staff are trained in preliminary recovery techniques, documenting damage to your records, and authorizing destruction of damaged records. Professional vendors can handle larger disasters.

Q. What help do you give in case of an emergency?

- A.** We will do everything we can to visit you at the earliest opportunity in order to provide hands-on assistance. We can assist you in appraising the records that have been damaged so that precious resources (and especially time) are not spent on records with lesser value. We can provide lists of professional recovery vendors that you can contact to preserve your essential and permanent records.
-

Q. What can I do to prepare for an emergency?

- A.** We provide training on disaster preparation that includes a discussion of the roles of proper inventories, staff training, and advance contracts with recovery vendors. If you would like to have this workshop presented, call a Records Management Analyst.
-

Q. What are essential records?

- A.** Essential records are records that are necessary for continuity of operations in the event of a disaster. There are two common categories of records that are considered essential:
- **Emergency operating records** – including emergency plans and directives, orders of succession, delegations of authority, staffing assignments, selected program records needed to continue the most critical agency operations, as well as related policy or procedural records.
 - **Legal and financial rights records** – these protect the legal and financial rights of the Government and of the individuals directly affected by its activities. Examples include accounts receivable records, Social Security records, payroll records, retirement records, and insurance records. These records were formerly defined as “rights-and-interests” records.

Essential records should be stored in safe, secure locations as well as duplicated and stored off-site, if possible.

STAFF TRAINING

Q. What types of workshops or training do you offer?

- A.** We have a group of prepared workshops that we can offer at any time at various locations throughout the state. Contact a Records Management Analyst if you are interested in having one of the workshops presented to your agency. We will work with you directly to develop training suited to your specific needs. Our basic workshops are:
- Managing public records in North Carolina
 - Disaster preparedness and recovery
 - Digital communications

Q. Will you design a workshop especially for our office?

- A.** Yes, we will. Let a Records Management Analyst know what type of training you need.

Q. Are workshops offered only in Raleigh?

- A.** No, we will come to your offices to present the workshops you need. We have no minimum audience requirement. We will also do presentations for professional associations, regional consortiums, and the public.

To arrange a workshop, please call the State Records Center at 919-814-6900 or contact a Records Management Analyst (<https://archives.ncdcr.gov/government/local/analysts>).

Q. Is there a fee for workshops?

- A.** Not at this time.

Q. Are the workshops available in an online format?

- A.** We can offer a virtual workshop for your agency upon request. For descriptions of available webinars, see <https://archives.ncdcr.gov/government/training/webinars>. You can also find several online tutorials available on the State Archives of North Carolina website (<https://archives.ncdcr.gov/government/training/online-tutorials-and-resources>).



Request for Change in Local Government Records Schedule

Use this form to request a change in the records retention and disposition schedule governing the records of your agency. Submit the signed original and keep a copy for your file. A proposed amendment will be prepared and submitted to the appropriate state and local officials for their approval and signature. Copies of the signed amendment will be sent to you for insertion in your copy of the schedule.

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

CHANGE REQUESTED

Specify title and edition of records retention schedule being used: _____

☐ Add a new item

☐ Delete an existing item

Standard Number _____ Page _____ Item Number _____

☐ Change a retention period

Standard Number _____ Page _____ Item Number _____

Title of Records Series in Schedule or Proposed Title:

Inclusive Dates of Records:

Proposed Retention Period:

Description of Records:

Justification for Change:

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date



Request for Disposal of Unscheduled Records

AGENCY INFORMATION

Requestor name

Location and Agency [e.g., County/Municipality + Department of Social Services]

Phone and e-mail

Mailing Address

In accordance with the provisions of N.C. GEN. STAT. § 121 and § 132, approval is requested for the destruction of records listed below. These records have no further use or value for official administrative, fiscal, historical, or legal purposes.

RECORDS TITLE AND DESCRIPTION	INCLUSIVE DATES	QUANTITY	RELEVANT STATUTORY REGULATIONS	PROPOSED RETENTION PERIOD

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date

Concurred by:

Signature

Assistant Records Administrator
State Archives of North Carolina

Date



Request for Disposal of Original Records Duplicated by Electronic Means

If you have questions, call (919) 814-6900 and ask for a Records Management Analyst.

This form is used to request approval from the Department of Natural and Cultural Resources to dispose of non-permanent paper records that have been scanned, entered into databases, or otherwise duplicated through digital imaging or other conversion to a digital environment. This form does not apply to records that have been microfilmed or photocopied or to records with a permanent retention.

Agency Contact Name:		Date (MM-DD-YYYY):
Phone (area code):	E-mail:	
County/Municipality:	Office:	
Mailing address:		

Records Series Title A group of records as listed in records retention schedule	Description of Records Specific records as referred to in-office	Inclusive Dates (1987-1989; 2005-present)	Approx. Volume of Records (e.g. "1 file cabinet," "5 boxes")	Retention Period As listed in records retention schedule

Requested by:

Signature

Title

Date

Approved by:

Signature

Requestor's Supervisor

Date

Concurred by:

Signature

Assistant Records Administrator
State Archives of North Carolina

Date



File Plan

County/Municipality					
Division		Section		Branch	

[illegible]

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CHANGE LOG FOR PROGRAM RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES



Issued By:



North Carolina Department of Natural and Cultural Resources
Division of Archives and Records
Government Records Section

October 1, 2021

EXECUTIVE SUMMARY

This document lists the changes that have been made from the Municipal Records Retention and Disposition Schedule issued on September 10, 2012 as well as the County Management Records Retention and Disposition Schedule issued on April 15, 2013 that are now present in the 2020 Program Records Schedule for Government Agencies. While previously adopted amendments, grammatical and alphabetization changes, wordsmithing, and the updating of citations are not listed, substantive changes are listed in the left-hand column. In the center column are the titles of new records series that have been added to the schedule. In the right-hand column are records series that have been either superseded by the *General Records Schedule: Local Government Agencies* or discontinued because the records are no longer created or received by local departments.

MUNICIPAL AND COUNTY MANAGEMENT CLARIFICATION

While some items included below were identical on the Municipal and County Management schedules, there are cases where an item was only on one schedule or had a different name on each schedule. In those cases, the item will have either an (M) or a (CM) after its title. An (M) indicates that the referenced item was only on the Municipal schedule. A (CM) indicates that the referenced item was only on the County Management schedule. When titles differ, or when multiple items from one schedule fall under a larger term in the other schedule, all previous item titles are provided.

STANDARD 10: AIRPORT AUTHORITY RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>STANDARD 10: AIRPORT AUTHORITY RECORDS</i>		
		AIRPORT CERTIFICATION MANUAL See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Accreditation Records.
		COMMUNICATIONS RECORDINGS See General Records Schedule: Local Government Agencies, Standard 7 (Public Relations Records), Audio-Visual Recordings.

STANDARD 11: ANIMAL SERVICES RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 11: ANIMAL SERVICES RECORDS		
		ACTIVITY REPORTS (ANIMAL CONTROL) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
ANIMAL ABUSE AND CRUELTY RECORDS Used the records series title from the County Management schedule; changed disposition instructions from Municipal schedule to match County Management schedule.		ANIMAL ABUSE CASES (M) ANIMAL CRUELTY RECORDS (M)
		ANIMAL BITE RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
ANIMAL COMPLAINT RECORDS Removed reference to abuse records, which are separately covered in "Animal Abuse and Cruelty Records."		
ANIMAL CONTROL RECORDS Removed animal abuse case disposition instructions, which are separately covered in "Animal Abuse and Cruelty Records"; added disposition instructions for animal control citations and compliance orders.		ANIMAL CONTROL CITATIONS/COMPLIANCE ORDERS DANGEROUS ANIMAL RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 11: ANIMAL SERVICES RECORDS		
	ANIMAL SHELTER RECORDS	ANIMAL ADOPTION RECORDS CERTIFICATES OF ANIMAL RELEASE IMPOUNDMENT RECORDS (M) OWNER CONTACT NOTICE RECORDS SHELTER DISPOSITION SHEETS
		RABIES CONTROL REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		REFERENCE MATERIAL (ANIMAL CONTROL) (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference File.
RABIES VACCINATION RECORDS Clarified title of "Vaccination Records."		

STANDARD 12: CODE ENFORCEMENT AND INSPECTION RECORDS

(This standard previously encompassed STANDARD 5: BUILDING INSPECTION RECORDS (of the Municipal schedule) and STANDARD 5: CODE ENFORCEMENT AND INSPECTION RECORDS (of the County Management schedule))

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
BLUEPRINTS AND SPECIFICATIONS Disposition was amended to change “b” disposition from “1 year after permit is issued” to “1 year after completion of project.”		For agency-owned buildings, see General Records Schedule: Local Government Agencies, Standard 1, (Administration and Management Records), Blueprints and Specifications.
		BUILDING AND FIRE CODE VIOLATIONS CASES (Municipal) See Violations: Building and Housing
		BUILDING INSPECTION REPORTS (Municipal) See Building and Road Permitting and Inspection Records.
		BUILDING PERMITS AND APPLICATIONS (Municipal) See Building and Road Permitting and Inspection Records.
		BUILDING PERMIT LOG (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		BUILDING PERMIT RECEIPT BOOKS (Municipal) See Permit Receipt Books.
		BUILDING TRADES CERTIFICATIONS (Municipal) See Trades Certifications.
		BURNING PERMITS (BUILDING INSPECTIONS) (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)
		BUSINESS CERTIFICATION RECORDS (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Business Certification Records
		CERTIFICATES OF OCCUPANCY (Municipal) See Building and Road Permitting and Inspection Records.
		CONSTRUCTION REPORTS (Municipal) See Reports: Monthly Building Permits and Construction.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		CONTRACTORS LICENSING (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)
		DEMOLITION FILE (Municipal) See Building and Road Permitting and Inspection Records.
		ENCROACHMENTS OF RIGHT-OF-WAY APPLICATIONS AND PERMITS (Municipal) See Permits: Encroachments of Right-of-Way.
		EROSION AND SEDIMENT CONTROL AFFIDAVITS See General Records Schedule: Local Government Agencies, Standard 6 (Legal Records), Litigation Case Records.
		FACILITY MAINTENANCE, REPAIR, AND INSPECTION (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Facility Maintenance, Repair, and Inspection Records.

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CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		HAZARDOUS WASTE DISPOSAL RECORDS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Hazardous Materials Management.
ILLEGAL DUMPING FILE Cross-reference added to Violations.		
		INSPECTIONS (Municipal) Inspection records now separated into different categories within schedule depending on kind of inspection. For records concerning violations, see Violations.
INSPECTIONS Standardized retention period for all inspections at 6 years (increasing that for Sewage Disposal Systems from 2 years and for Substandard Housing and Unsafe Buildings from 5 years)		INSPECTIONS: ELECTRIC POWER AND NATURAL GAS SYSTEM (County Management) INSPECTIONS: PERIODIC REPORTS OF INDUSTRIAL FACILITIES (County Management) INSPECTIONS: SANITARY LANDFILL (County Management) INSPECTIONS: SEWAGE DISPOSAL SYSTEM (County Management) INSPECTIONS: SUBSTANDARD HOUSING AND UNSAFE BUILDINGS (County Management) INSPECTIONS: WASTE LOADS (County Management) INSPECTIONS: WATER AND WASTEWATER SYSTEM (County Management)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		INSPECTIONS: ENVIRONMENTAL HEALTH SUMMARIES (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)
		INSPECTOR WORKSHEETS (Municipal) See Inspections
		LABORATORY OPERATIONS RECORDS (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)
		LANDFILL OPERATIONAL PLAN (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Strategic Plan.
		MAPS, PLATS, AND DRAWINGS (Municipal) See Program Schedule for Local Government Records, Standard 15 (Planning and Regulation of Development Records), Maps, Plats, and Drawings (Official).

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		MANUFACTURED HOME PERMITS (Municipal) See Program Schedule for Local Government Records, Standard 15 (Planning and Regulation of Development Records), Permits: Temporary Manufactured Home.
		MONTHLY BUILDING PERMITS AND CONSTRUCTION REPORTS (Municipal) See Reports: Monthly Building Permits and Construction.
		NORTH CAROLINA SEDIMENTATION AND POLLUTION CONTROL COMMISSION See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)
		PERIODIC INSPECTION REPORTS (Municipal) See Inspections
		PERMIT LOG (County Management) Record no longer applicable.
		PERMITS: BURNING (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		PERMITS: FACILITIES USE (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Facility, and Vehicle Usage Records.
		PERMITS: LANDFILL (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)
		PERMITS: MISCELLANEOUS (NON-CONSTRUCTION) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Miscellaneous (Non-Building) Applications, Licenses, and Permits.
		REPORTS: DAILY WATER AND WASTEWATER FACILITY OPERATORS LOG See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		REPORTS: DISCHARGE MONITORING See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		REPORTS: ENVIRONMENTAL HEALTH (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		REPORTS: LANDFILL MONITORING See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		REPORTS: U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		REPORTS: WASTEWATER MAINTENANCE OPERATION See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		SEWAGE DISPOSAL SYSTEM INSPECTION REPORTS (Municipal) See Inspections: Sewage Disposal Systems.
		STREET ADDRESS LOG (Municipal) See Program Schedule for Local Government Agencies, Standard 19 (Street Maintenance, Public Works, and Engineering Records), Street Name and House Number File.
		STREET INFORMATION See Program Schedule for Local Government Agencies, Standard 19 (Street Maintenance, Public Works, and Engineering Records), Street Name and House Number File.
		SUBSTANDARD HOUSING INSPECTION REPORTS (Municipal) See Inspections

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 12: CODE ENFORCEMENT RECORDS		
		TROUT BUFFER VARIANCES (County Management) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading File)
VIOLATIONS Description expanded to describe various kinds of violations. Changed retention from 3 years to 6 years; added "b" to account for "remaining records."		
VIOLATIONS: SOLID WASTE MANAGEMENT Changed "produced" to "issued" in item description.		
		WASTE OIL, BATTERIES, AND ELECTRONICS COLLECTION FILE See General Schedule for Local Government Records, Standard 8 (Risk Management Records), Hazardous Materials Management.
WATER ANALYSIS Cross-reference added to Violations.		

STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS

The most significant change from the previous schedule is that all items pertaining to Emergency Management are now included in the General Records Schedule: Local Government Agencies. Since Emergency Management is a function carried out by various local agencies, and since Emergency Management is not necessarily an agency paired with Emergency Medical Services (EMS) and Fire Departments, it is logical to place the Emergency Management items in the General Schedule where they apply to all local agencies. **All Emergency Management specific standards will now be found in Standard 8 (Risk and Emergency Management) of the General Records Schedule: Local Government Agencies, to be reflected in the new revisions to the General Schedule for 2020.**

Clarification note added to the standard introduction concerning body-worn camera footage from EMS and Fire Department personnel that reads: *Footage from body-worn cameras is classified with the content captured or the purpose of the footage rather than by its format. Recordings may fit under FIRE INVESTIGATION CASE FILES, DISPATCH RECORDS AND RECORDINGS, PUBLICITY RECORDS (General Schedule), TRAINING AND EDUCATIONAL RECORDS, and other items as appropriate. Footage is only confidential if it fits within an item where confidentiality is conferred by state or federal statute.*

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	..	911 CALL RECORDINGS (CM) 911 TAPE RECORDINGS (M) See 911 Communication Records and Recordings.
	911 COMMUNICATION RECORDS AND RECORDINGS This item includes 911 Communication Records and 911 Call Recordings. Description explicitly includes both calls and text messages. New retention for all 911 records is retain for 30 days unless made part of a case file.	911 COMMUNICATION RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		911 FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Policies and Procedures OR General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Training and Educational Records.
		ACCIDENT FILE (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Accident/Incident Reports (Customer and Employee).
		ACTIVITY REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
AMBULANCE CALL REPORTS (ACR)/PATIENT CARE REPORTS (PCR) Minimum retention period now three years after case is closed rather than eleven years. Confidentiality statutes also added.		PATIENT CARE REPORTS (M)
		AMBULANCE DISPATCH RECORDS See Dispatch Records and Recordings.

2021 LOCAL GOVERNMENT PROGRAM RECORDS RETENTION AND DISPOSITION SCHEDULE CHANGE LOG



CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		AMBULANCE SERVICE RUN LOG See Dispatch Records and Recordings.
		ANNUAL REPORT (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		ANNUAL SUBMISSION ON PERSONNEL AND ADMINISTRATION FUNDS FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
BUILDING AND FIRE SAFETY SYSTEM PLANS Revision of Plans item to clarify coverage of building and fire safety plans for commercial, industrial, and government-owned properties, as per records typically held by local fire marshals.		
		BUILDING INSPECTIONS See Fire Safety Inspections and Permits. Other kinds of inspections are found in the Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement Records).

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		COMPANY RUN REPORT (FIRE JOURNAL) See Dispatch Records and Recordings.
		CONSOLIDATED MONTHLY REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		DAILY LOG (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		DISASTER AND EMERGENCY MANAGEMENT PLANS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Disaster and Emergency Management Plans.
		DISPATCH FILE (M) See Fire Dispatch File.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	DISPATCH RECORDS AND RECORDINGS Consolidated item includes Ambulance Dispatch Records, Ambulance Service Run Log, Company Run Report (Fire Journal), Fire Alarm Journal, and Fire Dispatch File. Item description expanded to include body-worn camera footage from EMS and Fire Department personnel responding to an emergency unless footage fits explicitly within another item. New retention of all items is 30 days unless made part of a case file. Confidentiality statutes also added.	DISPATCH RECORDINGS
		EMERGENCY NOTIFICATIONS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Notifications.
		EMERGENCY SERVICES BILLING RECORDS (M) See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable.
		EMERGENCY SERVICES CORRESPONDENCE (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Correspondence and Memoranda.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		EQUIPMENT RECORDS (APPARATUS AND MAINTENANCE FILE) (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.
		EQUIPMENT RECORDS (APPARATUS OPERATING EXPENSE FILE) (M) Purchase orders of equipment are now found in General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Purchase Orders Reports of expenditures relating to the usage and upkeep of equipment fall under General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Budget Reports.
		EQUIPMENT RECORDS (APPARATUS TEST REPORTS) (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		EQUIPMENT RECORDS (EQUIPMENT ISSUED TO FIREFIGHTERS AND EMERGENCY PERSONNEL) (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.
		EQUIPMENT RECORDS (HOSE RECORDS) (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.
		EQUIPMENT RECORDS (HOSE TESTS) (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.
		EVACUATION PLANS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Disaster and Emergency Management Plans.
		EXPOSURE RECORDS (M) See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Medical Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		FEDERAL ASSISTANCE PROGRAMS REFERENCE RECORDS (M) As reference copies, these records can be destroyed when their reference value ends for the agency.
		FIRE ALARM JOURNAL See Dispatch Records and Recordings.
		FIRE INSPECTION REPORTS (M) See Fire Safety Inspections and Permits.
FIRE INVESTIGATION CASE FILES Confidentiality statute added for criminal investigations. Description modified to allow for agency's decision as to what to include in a fire investigation file. Cross-reference added to Case History File: Felonies and Case History File: Misdemeanors from the Law Enforcement Records standard of the Local Program Schedule.		
		FIRE INVESTIGATION RECORDS See Fire Investigation Case Files.
		FIRE LIMITS ORDINANCES See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Ordinances.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
	FIRE SAFETY INSPECTIONS AND PERMITS Item renamed to reflect inclusion of permits.	FIRE SAFETY INSPECTIONS (CM)
		FIXED NUCLEAR FACILITIES PLANS FILE See General Schedule, Standard 8 (Risk Management Records), Nuclear Facilities Plans File. Retention changed from “destroy in office after 3 years” to “destroy in office when superseded or obsolete.”
		HOSE RECORDS (CM) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.
		HYDRANT RECORDS (CM) HYDRANT RECORDS (LOCATION AND MAIN SIZE) (M) HYDRANT RECORDS (MAINTENANCE AND TEST FILE) (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.
		INVENTORY RECORDS FILE (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Inventories.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		LOCAL EMERGENCY PLANNING COMMITTEE MINUTES See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Public Bodies: Minutes.
		LOCAL EMERGENCY COMMITTEE PLANS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Disaster and Emergency Management Plans.
		NATIONAL FLOOD INSURANCE PROGRAM RECORDS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), National Flood Insurance Program Records.
		NORTH CAROLINA FIRE ASSOCIATION RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Membership Records.
		NORTH CAROLINA FIRE CASUALTY REPORT Original copy retained by N.C. State Fire Commission and covered in retention schedule for state agencies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
NORTH CAROLINA FIRE INCIDENT REPORT Retention for original items remains permanent. Retention for copies provided to other agencies moved to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.		
		NORTH CAROLINA FIREMAN'S PENSION FUND PRINTOUT Removed from schedule. Printouts are not the record copy of the item. The records of the Fireman's Pension Fund are maintained at the state level. Agencies may create printouts as needed, but they have no responsibility for maintaining printouts as a public record unless the local agency changes its content.
		NOTIFICATION TO CORRECT (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement Records), Violations.
		NUCLEAR CIVIL PROTECTION PLAN See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Disaster and Emergency Management Plans.

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CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		OPERATIONS FILE (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Correspondence OR Logistics Materials.
		PATIENT CARE REPORTS (M) See Ambulance Call Reports/Patient Care Reports.
	PHARMACEUTICAL AND NARCOTICS RECORDS Consolidated item added with explanatory description and CFR citation to reflect DEA requirements for tracking administration of controlled substances. Confidentiality statutes also added.	PHARMACEUTICAL RECORDS
		PLANS See Building and Fire Safety System Plans.
		PUMP TEST RECORDS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Emergency Drills and Equipment Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		RADIOLOGICAL DEFENSE (RADEF) DATA BANK RADIOACTIVE MATERIAL INVENTORY See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Hazardous Materials Training Records.
		RADIOLOGICAL DATA STATION FILE See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Hazardous Materials Training Records.
		RADIOLOGICAL EQUIPMENT INVENTORY (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Inventories.
		RESOLUTIONS ON ESTABLISHMENT OF LOCAL AGENCY See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Resolutions.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		SAFETY COMMITTEE MEETINGS (CM) SAFETY COMMITTEE AGENDA AND MEETING PACKETS (M) SAFETY COMMITTEE MINUTES (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Minutes of Public Bodies.
		SHELTER FACILITY LISTING See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Disaster and Emergency Management Plans.
		STATE OF EMERGENCY ORDINANCES See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Ordinances.
		SUPERFUND AUTHORIZATION RECOVERY ACT INFORMATION FILE See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Superfund Authorization Recovery Act Information File.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 13: EMERGENCY MEDICAL SERVICES AND FIRE DEPARTMENT RECORDS		
		TRAINING AND EDUCATION FILE (M) See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Training and Education Records.
		VOLUNTEER FIRE/RESCUE DEPARTMENT LOGS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Logistics Materials.
		VOLUNTEER FIREFIGHTERS MEDICAL RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Medical Records.
		VOLUNTEER FIREFIGHTERS PERSONNEL RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Personnel Records (Official Copy).

STANDARD 14: PARKS AND RECREATION RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 14: PARKS AND RECREATION RECORDS		
		ACCIDENT/INCIDENT REPORTS (PARKS & RECREATION) (CM) ACCIDENT/INCIDENT REPORTS (PARKS & RECREATION) (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Accident/Incident Reports (Customer and Employee).
		ANNUAL ACTIVITY REPORT See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		ATHLETIC PROGRAM FILE (M) See Recreation Programs.
		BIRTH CERTIFICATES (REFERENCE COPIES) See Recreation Programs.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 14: PARKS AND RECREATION RECORDS		
		FACILITY USE PERMITS (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Facility, and Vehicle Usage Records.
		INTERNATIONAL FEDERATION OF PARKS AND RECREATION ADMINISTRATION FILE (CM) INTERNATIONAL FEDERATION OF PARKS AND RECREATION ADMINISTRATION FILE (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Membership Records.
		INVENTORY OF FACILITIES (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Inventories.
		MAPS FILE (M) See General Records Schedule: Local Government Agencies, Standard 3 (Geographic Information System), Maps: Parks.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 14: PARKS AND RECREATION RECORDS		
<p>OFFICIALS FILE Description revised to:</p> <p>Records concerning individuals who officiate games. Includes schedule and correspondence (including e-mail).</p> <p>SEE ALSO: GENERAL RECORDS SCHEDULE: LOCAL GOVERNMENT AGENCIES, Payroll and Earnings Records (STANDARD 2: BUDGET, FISCAL, AND PAYROLL RECORDS) or Seasonal and Contract Worker Records (STANDARD 6: PERSONNEL RECORDS) for disposition of payment records.</p> <p>Item b) deleted from Disposition Instructions</p>		
		<p>PARKS AND RECREATION AGENDA AND MEETING PACKETS FILE (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Public Bodies: Agenda and Meeting Packets.</p>
		<p>PARKS AND RECREATION BOARD MEETINGS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Public Bodies: Minutes.</p>

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 14: PARKS AND RECREATION RECORDS		
PARKS PLANNING FILE Description revised to Records concerning and to refer to all parks not just county or municipality. References to Comprehensive Plans and Maps updated to current general schedule standard.		
		PROMOTIONAL LEAFLETS AND BROCHURES (M) See General Records Schedule: Local Government Agencies, Standard 7 (Public Relations Records), Publicity Records.
		RATE AND FEE REGULATION (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Rates and Fee Schedules.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 14: PARKS AND RECREATION RECORDS		
RECREATION PROGRAMS Fees Paid added to description (CM) Disposition Instruction changed to: A) Destroy age verification records when reference value ends B) Destroy in office remaining records after 3 years (M) (CM) Description includes minor changes including change to Records concerning. Citation to GS132-1.12 added (M).		
		RECREATION EQUIPMENT RECORDS (CM) RECREATION EQUIPMENT RECORDS (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Repair, and Inspections Records.
		RELEASE FORMS (CM) RELEASE FORMS (M) See General Records Schedule: Local Government Agencies, Standard 6 (Legal Records), Release Forms.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 14: PARKS AND RECREATION RECORDS		
		RESERVATION RECORDS (CM) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Facility, and Vehicle Usage Records.
		RULES AND REGULATIONS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Administrative Directives, Regulations, and Rules
		SPECIAL EVENTS PROGRAM FILE (CM) SPECIAL EVENTS PROGRAM FILE (M) See General Records Schedule: Local Government Agencies, Standard 7 (Public Relations Records), Fund Drive and Event Records.

STANDARD 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS

The most noticeable change from previous schedules is that the title has been amended from Planning and Zoning to Planning and Regulation of Development in accordance with changes implemented in G.S. § 160A-360 (repealed effective January 1, 2021).

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS</i>		
		APPEARANCE COMMISSION AGENDA AND MEETING PACKETS FILE (County Management, Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Minutes of Public Bodies
		APPEARANCE COMMISSION MINUTES (County Management, Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Agenda and Meeting Packets
		APPEARANCE COMMISSION PROJECT FILE (County Management, Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Projects
		ASSESSMENT RECORDS FILE (County Management, Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS</i>		
		BOARD OF ADJUSTMENT AGENDA AND MEETING PACKETS (County Management, Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Agenda and Meeting Packets
	BOARD OF ADJUSTMENT CASE FILES AND INDEXES Combined previous Board of Adjustment Case File and Board of Adjustment Case Index Records	
		BOARD OF ADJUSTMENT MINUTES (County Management, Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Minutes of Public Bodies
	CERTIFICATES OF APPROPRIATENESS FILE Issued by the Historic Preservation Commission and retained for life of structure.	
COMMUNITY DEVELOPMENT BLOCK GRANTS RECORDS: ADMINISTRATIVE Final reports added to item to allow for historical value retention.		

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS</i>		
COMMUNITY DEVELOPMENT BLOCK GRANTS RECORDS: APPLICATIONS Disposition added for rejected applications. Final reports removed from item and added to CDBG Administrative records.		
	COMMUNITY DEVELOPMENT BLOCK GRANTS RECORDS: OUTSTANDING LOAN BALANCES	
	COMMUNITY DEVELOPMENT BLOCK GRANTS RECORDS: SUBJECT TO REVERSION OF ASSETS PROVISIONS OR CHANGE OF USE OF REAL PROPERTY	
COMPREHENSIVE PLAN AND AMENDMENTS FILE Modified to excise "Land Use" from title to coincide with definition given in G.S. 160D 1-2. Modified "b" disposition to read "remaining records" instead of listing specific titles.		
EASEMENT RELEASE REQUEST FILE Removed "approved by the Planning Board" from description as statute does not dictate who has approval authority and is performed by more than just the planning board.		

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS</i>		
		FEASIBILITY STUDIES See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
MASTER SUMMARY (LOG OR REGISTER) Retention changed from “permanent” to “destroy when superseded/obsolete.” The Log itself is permanent but the information added to the log is what the retention instructions should be applied to.		
		ORTHOPHOTOGRAPHY (County Management) See General Records Schedule: Local Government Agencies, Standard 3 (Geographic Information System (GIS) Records), Layers: Orthoimagery.
		PHOTOGRAPHS AND NEGATIVES (AERIAL) (County Management) See General Records Schedule: Local Government Agencies, Standard 3 (Geographic Information System (GIS) Records), Layers: Orthoimagery.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS</i>		
		PLANNING AND ZONING BOARD MEETINGS (County Management) (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Agenda and Meeting Packets and Minutes of Public Bodies.
		PLANNING AND ZONING STUDIES (County Management) (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Strategic Plan and Projects.
		PRELIMINARY SUBDIVISION AND GROUP DEVELOPMENT SITE PLANS See Subdivisions.
		REDEVELOPMENT PLANNING RECORDS (County Management) (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Strategic Plan.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS</i>		
		REFERRED PROJECTS (County Management) (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File.
SPECIAL USE PERMIT RECORDS AND INDEX FILE Amended to change “Conditional Use” to “Special Use” to fit definitions given in G.S. 160D. Also removed “sign permits and temporary use” permits from description as these are covered under Permits: Zoning Compliance.		
		STREET NAMES AND CHANGES OF STREET NAMES FILE (County Management) (Municipal) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File.
SUBDIVISION RECORDS “Maps” and “plats” removed from item description. Cross-reference added to Maps, Plats, and Other Drawings.		

2021 LOCAL GOVERNMENT PROGRAM RECORDS RETENTION AND DISPOSITION SCHEDULE CHANGE LOG



CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 15: PLANNING AND REGULATION OF DEVELOPMENT RECORDS</i>		
VARIANCES Retention changed to now maintain item permanently in the minutes of the Board of Adjustment or other governing body.		

STANDARD 16: PUBLIC HOUSING AUTHORITIES AND REDEVELOPMENT COMMISSION RECORDS

General note: In the case of many grant-funded records, numerous new records series have been added to reflect the very precise retention requirements for these records established by the federal government.

Community Development Block Grant records moved to Standard 15: Planning and Regulation of Development Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 16: PUBLIC HOUSING AUTHORITIES AND REDEVELOPMENT COMMISSION RECORDS</i>		
		CDBG RECORDS See Program Records Schedule: Local Government Agencies, Standard 15 (Planning and Regulation of Development Records), Community Development Block Grant (CDBG) Records: Administrative, Applications, Outstanding Loan Balances, AND Records Subject to Reversion of Assets Provisions or Change of Use of Real Property.
	CONTINUUM OF CARE RECORDS	
	CRIMINAL RECORDS CHECKS	
	EMERGENCY SOLUTIONS GRANTS RECORDS	
	HOME INVESTMENT PARTNERSHIPS PROGRAM RECORDS	LAND MARKETING AND DEVELOPMENT RECORDS PROPERTY MANAGEMENT RECORDS REHABILITATION LOAN RECORDS RELOCATION RECORDS
	HOUSING ASSISTANCE FOR PERSONS WITH DISABILITIES	

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 16: PUBLIC HOUSING AUTHORITIES AND REDEVELOPMENT COMMISSION RECORDS</i>		
	HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS RECORDS	
	LANDLORD MONITORING RECORDS	
REDEVELOPMENT PLANS Changed title to encompass approved as well as rejected plans; added description; clarified disposition instructions for approved vs. rejected projects		CERTIFICATION FILE

STANDARD 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS</i>		
		ACCREDITATION RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Accreditation Records.
		AGENCY LOGS (SHEETS) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		APPLICATIONS FOR AWARDS If application is for employee awards, see General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Service Awards and Commendations. For application is for public awards, see General Records Schedule: Local Government Agencies, Standard 7 (Public Relations Records), Community Awards.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
Standard 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
		CALL IN LOGS (SHEETS) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Vehicle Maintenance, Repair, and Inspection Records AND Standard 5 (Information Technology Records) Voice Over Internet Protocol (VoIP) Records.
		CUSTOMER (RIDER) ALERTS See General Records Schedule: Local Government Agencies, Standard 7 (Public Relations Records), Publicity Records.
		DISPATCH RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		LOST AND FOUND RECORDS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Lost, Stolen, or Damaged Property Reports.
		NATIONAL TRANSIT DATABASE (NTD) REPORT See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
Standard 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
		OPERATOR BID RECORDS See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Bids for Purchase.
		OPERATOR SCHEDULING AND ASSIGNMENT RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies and Standard 4 (Human Resources Records), Work Schedules and Assignments.
		RADIO DISPATCH RECORDINGS AND LOGS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies
		RIDERSHIP REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Facility, and Vehicle Usage Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
Standard 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
		ROUTE MAINTENANCE RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Facility Maintenance, Repair, and Inspection Records.
		ROUTE REQUESTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Citizen Comments, Complaints, Petitions, and Service Requests
		SAFETY CERTIFICATIONS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Accreditation Records.
		SERVICE PERFORMANCE RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Performance Reviews.
		SERVICE PLANNING AND DEVELOPMENT RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Strategic Plan.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
Standard 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
		SHELTER RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Blueprints and Specifications AND Inventories.
		SHUTTLE LOGS (SHEETS) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		TERMINAL DISPATCH RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		TICKET CONSIGNMENT RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Inventories
		TRANSPORTATION SYSTEM OPERATIONS REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
Standard 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS		
		TRANSPORTATION SYSTEM SERVICE PERFORMANCE EVALUATIONS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Vehicle, and Facility Usage Records.
		TRANSPORTATION SYSTEM STATISTICAL RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		TRIP REQUESTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Citizen Comments, Complaints, Petitions, and Service Requests
		VEHICLE BREAKDOWN RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Vehicle, and Facility Usage Records and Work Orders

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 17: PUBLIC TRANSPORTATION SYSTEMS RECORDS</i>		
		VEHICLE OPERATOR INSTRUCTIONS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment and Vehicle Reference Records
		VEHICLE USAGE LOGS (SHEETS) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS

This standard combines the Municipal Schedule Standard 17, Public Utilities and Environmental Management Records, and the County Management Schedule Standard 15, Public Utilities and Waste Management Records. To ease searching, records series have been loosely grouped into the categories Environmental Records, Erosion Control Records, Flood Control Records, Utilities Records, and Water Quality Records. This change log indicates name changes under “changes” and the Municipal and County items that have been superseded under “discontinued items.” Some overlap was found with County Management Schedule Standard 5, Code Enforcement and Inspection Records. In these cases, the records series can now be found on the Local Government Program Schedule Standard 12, Code Enforcement and Inspection.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		ABANDONED UTILITY LINE RECORDS See Program Records Schedule: Local Government Agencies , Standard 18 (Public Utilities And Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.
		AIR POLLUTION SOURCE INFORMATION (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Air Pollution Source Information.
		ANNUAL REPORTS: UTILITIES See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		ASBESTOS DISPOSAL FILE (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Hazardous Materials Management.
		BATTERY COLLECTION FILE (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Discharge Monitoring Reports.
		CABLE TELEVISION FRANCHISE RECORDS Service reports repealed by Session Law 2018-145. Remaining functions performed at state level by NC Department of the Secretary of State as of 2007 according to G.S. 66-351.
		CHRONOLOGY FILE (M) Item removed. Records in chronology file should be treated under their appropriate category in this schedule. Copies of records compiled in a ready reference file do not create new record copies.
		COMMUNITY WATER SYSTEM PERMIT (M) Record copy created and issued by N.C. Department of Environmental Quality. Copy kept at local level is a reference copy.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		COMPLAINTS (EROSION AND SEDIMENT CONTROL) (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records, Constituent Comments, Complaints, and Service Requests.
ENVIRONMENTAL: COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN AND AMENDMENTS Background surveys, studies, reports, and drafts integrated into Disposition (b), destroy in office when superseded or obsolete. Cross-reference added to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Comprehensive Plan.		COMPREHENSIVE SOLID WASTE MANAGEMENT PLAN AND AMENDMENTS (M)
		CONSTRUCTION DRAWINGS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Blueprints and Specifications.
		COUNTY LANDFILL RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Landfill Operational Plan.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		CUSTOMER ACCOUNT HISTORIES (M) See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable for financial history. See Environmental: Customer Usage Records for usage history.
		CUSTOMER DEPOSIT RECORDS (M) See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable.
		CUSTOMER FINANCIAL RECORDS See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable.
ENVIRONMENTAL: CUSTOMER USAGE RECORDS		CUSTOMER USAGE RECORDS
		CUSTOMER WORK ORDERS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records, Constituent Comments, Complaints, and Service Requests.
ENVIRONMENTAL: DAILY DISPOSAL TICKETS		DAILY DISPOSAL TICKETS (M)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
UTILITIES: DAILY WATER AND WASTEWATER FACILITY OPERATORS LOGS Description of item added. Disposition order reversed to reflect that wastewater treatment facility logs are retained longer than those of water treatment facilities.		DAILY FACILITY OPERATORS LOGS AND REPORTS (M)
		DAILY PLANT RECORDS (M) If waste or wastewater treatment plant, see Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Daily Water and Wastewater Facility Operators Logs. If other facility, see General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		<p>DAILY REPORT OF OPERATIONS AND COSTS (M)</p> <p>If waste or wastewater treatment plant, see Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Daily Water and Wastewater Facility Operators Logs.</p> <p>If other facility, see General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies AND Standard 2 (Budget, Fiscal, and Payroll Records), Budget Reports.</p>
		<p>DAILY TRIP REPORTS/LOGS (M)</p> <p>See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.</p>
		<p>DAM CONSTRUCTION FILES (M)</p> <p>See Program Records Schedule: Local Government Agencies, Standard 19 (Street Maintenance, Public Works, and Engineering Records), Project Records: Core.</p>

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		DAM OPERATIONS AND MAINTENANCE FILES (M) See Program Records Schedule: Local Government Agencies, Standard 19 (Street Maintenance, Public Works, and Engineering Records), Infrastructure Maintenance Records.
		DIRECT DRAFT AUTHORIZATIONS (M) See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Electronic Funds Transfers (EFT).
ENVIRONMENTAL: DISCHARGE MONITORING REPORTS Order of dispositions changed to place longest retention requirements (NPDES reports and annual reports) ahead of daily reports.		DISCHARGE MONITORING REPORTS (M)
		DRIVERS' DAILY REPORTS (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		DROUGHT CONTINGENCY PLANS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Drought Contingency Plans.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
UTILITIES: ELECTRIC POWER AND NATURAL GAS FACILITY ENGINEERING AND SYSTEM PLANS Description of item added. Cross-reference added to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Comprehensive Plan. Disposition changed. Records are no longer permanent. If records are an element of the Comprehensive Plan, destroy in office when reference value ends. If not an element of the Comprehensive Plan, destroy in office when superseded or obsolete.		ELECTRIC POWER AND NATURAL GAS FACILITY ENGINEERING AND SYSTEM PLANS (M)
UTILITIES: ELECTRIC POWER AND NATURAL GAS PERMITS AND APPROVAL RECORDS		ELECTRIC POWER AND NATURAL GAS PERMITS AND APPROVAL RECORDS (M)
		ELECTRIC POWER AND NATURAL GAS SYSTEM INSPECTIONS AND TESTS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MAINTENANCE AND REPAIR RECORDS Disposition (b) removed; disposition for all records now destroy in office 3 years after equipment is no longer owned and/or operational.		ELECTRIC POWER AND NATURAL GAS SYSTEM MAINTENANCE AND REPAIR RECORDS (M)
UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM MANAGEMENT PLANS Cross-reference added to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Comprehensive Plan. Disposition changed from retain in office permanently to retain in office for life of system and then destroy.		ELECTRIC POWER AND NATURAL GAS SYSTEM MANAGEMENT PLANS (M)
UTILITIES: ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT RECORDS Disposition (a) modified for pre-approval and final approval letters from retain permanently to retain for life of system and then destroy.		ELECTRIC POWER AND NATURAL GAS SYSTEM PROJECT RECORDS (M)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		ENFORCEMENT CASES: EROSION AND SEDIMENT CONTROL (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Erosion and Sediment Control Enforcement Cases.
		ENGINEERING REPORTS FILE (M) See Program Records Schedule: Local Government Agencies, Standard 15 (Planning and Regulation of Development Records), Planning Review Case File.
EROSION CONTROL: EROSION AND SEDIMENT AFFIDAVITS		EROSION AND SEDIMENT AFFIDAVITS (M)
EROSION CONTROL: EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS		EROSION AND SEDIMENT CONTROL EXHIBIT RECORDS (M)
		EROSION AND SEDIMENT CONTROL NOTICE OF VIOLATIONS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Violations: Building and Housing.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
EROSION CONTROL: EROSION AND SEDIMENT CONTROL INSPECTIONS Description of item added. Disposition changed from destroy in office 3 years after final site inspection to destroy in office 6 years after final site inspection.		EROSION AND SEDIMENT CONTROL INSPECTIONS (M)
		EROSION AND SEDIMENT CONTROL PERMIT LOGS (M) See Erosion Control: Erosion and Sediment Control Permits.
		EROSION AND SEDIMENT CONTROL PERMIT RECEIPT BOOKS (M) See Erosion Control: Erosion and Sediment Control Permits.
EROSION CONTROL: EROSION AND SEDIMENT CONTROL PLANS Description of item revised to specify that item includes revisions, addendums, and records delineating who is financially responsible for the project. Disposition of approved plans changed from destroy in office 6 years after approval or last revision and/or addendum to destroy in office 3 years after expiration.		EROSION AND SEDIMENT CONTROL PLANS (M)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		EROSION AND SEDIMENT CONTROL TRADES CERTIFICATIONS (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Accreditation Records.
		EXEMPTION (VARIANCE) RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Exemption (Variance) Records.
		FINAL INSPECTION REPORTS (M) See Program Records Schedule: Local Government Agencies, Standard 15 (Planning and Regulation of Development Records), Planning Review Case File.
		FINANCIAL RESPONSIBILITY AND OWNERSHIP RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 19 (Street Maintenance, Public Works, and Engineering Records), Project Records: Engineering and Compliance.
	FLOOD CONTROL: FLOOD CERTIFICATIONS	
	FLOOD CONTROL: FLOOD STUDIES	

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		GARBAGE SERVICE FILE (M) See Environmental: Comprehensive Solid Waste Management Plan and Amendments AND General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records, Constituent Comments, Complaints, and Service Requests AND Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable.
		GROUNDWATER MONITORING RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Groundwater Monitoring Records.
		HAZARDOUS WASTE DISPOSAL RECORDS (M) See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Hazardous Materials Management.
		ILLEGAL DUMPING FILE (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Illegal Dumping File.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		INFORMATION AND WORKING FILE (M) Removed from schedule as information and working files are considered records with transitory or reference value until they are placed into another item.
UTILITIES: PUBLIC UTILITIES INSPECTION FORMS		INSPECTION FORMS (M)
		INSPECTIONS (EROSION AND SEDIMENT CONTROL) (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Inspections.
		INSPECTOR WORKSHEETS/NOTES (M) Item removed from schedule. Worksheets and notes have transitory value. Inspections are records of longer-term value.
WATER QUALITY: LABORATORY OPERATIONS RECORDS Description clarified to specify that records pertain to certification obtained by agency.		LABORATORY OPERATIONS RECORDS (M)
		LANDFILL INSPECTION RECORDS (M) See Environmental: Landfill Operational Plan.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
ENVIROMENTAL: LANDFILL MONITORING REPORTS (M) Cross-reference added to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Audits: Performance. Retention citation added: 15A NCAC 13B .1626(10)		LANDFILL MONITORING REPORTS (M)
ENVIRONMENTAL: LANDFILL OPERATIONAL PLAN Disposition changed from retain in office permanently to destroy in office when superseded or obsolete. Authority citation added: G.S. 130A-309.09D		LANDFILL OPERATIONAL PLAN (M)
ENVIRONMENTAL: LANDFILL PERMITS Description for item added Disposition split into two groups of records: Retain construction and operation permits for life of system and then destroy, while all other permits and related records are eligible for destruction after the 5-year reporting period is complete.		LANDFILL PERMITS (M)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		LANDFILL TONNAGE AND COST FILE (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Landfill Tonnage and Cost File.
UTILITIES: LANDLORD AGREEMENTS Disposition modified to destroy in office 3 years after expiration of agreement.		LANDLORD AGREEMENTS
		LEAD AND COPPER COMPLIANCE RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Lead and Copper Compliance Records.
		LIFT STATION INFORMATION FILE (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		LINE INSPECTION MAPS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.
		LOAD INSPECTION RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Inspections.
UTILITIES: MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS) Cross-reference added to General Records Schedule: Local Government Agencies, Standard 3 (Geographic Information System (GIS) Records), Maps: All Other. Disposition modified from retain permanently to retain for life of system and then destroy.		MAPS (UTILITY INSTALLATIONS & DISTRIBUTIONS)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		METER RECORDS (ELECTRIC, WATER, GAS) (CM) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Electric Power and Natural Gas System Maintenance and Repair Records.
		METER READING RECORDS (ELECTRIC, WATER, GAS) (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Customer Usage Records.
UTILITIES: METER INSTALLATION, TESTING AND CALIBRATION RECORDS (ELECTRIC, WATER, GAS) Description of item added. Dispositions changed. For records verifying installation of meter, destroy in office 3 years after equipment is no longer owned and/or operational. For notices to property owners of approval of utility installation, destroy in office after 2 years. For remaining records, destroy in office when reference value ends.		METER TESTING AND CALIBRATION RECORDS (ELECTRIC, WATER, GAS) (M)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		MONTHLY REPORTS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Discharge Monitoring Reports AND General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		MONTHLY REPORTS (LOCAL) (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Discharge Monitoring Reports AND General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
ENVIRONMENTAL: NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR DISPOSAL FILE Description of item added. Disposition changed from destroy when reference value ends to one year after resolution.		NOTICE OF VIOLATIONS FOR IMPROPER DISCHARGE OR DISPOSAL FILE (M)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		NOTICE TO PROPERTY OWNERS OF APPROVAL OF WATER UTILITY INSTALLATION (CM) NOTICE TO PROPERTY OWNERS OF APPROVAL OF UTILITY INSTALLATION (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Meter Installation, Testing, and Calibration Records (Electric, Water, Gas)
ENVIRONMENTAL: OUTSIDE WASTE CLEARANCE RECORDS		OUTSIDE WASTE CLEARANCE RECORDS
		PARTICIPATION CONTRACTS (M) See General Records Schedule: Local Government Agencies, Standard 6 (Legal Records), Contracts, Leases, and Agreements.
		PERIODIC INSPECTION REPORTS OF INDUSTRIAL FACILITIES (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Inspections.
EROSION CONTROL: EROSION AND SEDIMENT CONTROL PERMITS		PERMITS (EROSION AND SEDIMENT CONTROL) (M)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		PRELIMINARY PLAN REVIEW FILE (M) See Program Records Schedule: Local Government Agencies, Standard 15 (Planning and Regulation of Development Records), Planning Review Case File.
WATER QUALITY: PRETREATMENT PROGRAM RECORDS		PRETREATMENT PROGRAM RECORDS
UTILITIES: PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR RECORDS Disposition for as built plans and specifications changed from retain permanently to retain for life of system and then destroy. Dispositions re-ordered from longest length of required retention to shortest.		PUBLIC UTILITIES SYSTEM ENGINEERING, MAINTENANCE, AND REPAIR RECORDS (CM)
		RATE SCHEDULES (M) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Rate and Fee Schedules.
		RECYCLING TONNAGE RECORDS (M) See General Record Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
	UTILITIES: RECYCLING WATER RECORDS	
		REPORTS: RECYCLING TONNAGE (CM) See General Record Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		ROUTINE REPORTS (SANITATION) (M) See General Record Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		SANITARY LANDFILL INSPECTIONS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Landfill Operational Plan.
WATER QUALITY: PUBLIC WATER SANITARY SURVEY RECORDS Cross-reference added to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Audits: Performance. Disposition added for documentation of correction measures to destroy those records 2 years after their implementation.		SANITARY SURVEY RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		SCALE HOUSE VIDEO MONITORING RECORDINGS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Office and Property Security Records.
		SERVICE AGREEMENTS See General Records Schedule: Local Government Agencies, Standard 6 (Legal Records), Contracts, Leases, and Agreements.
UTILITIES: SERVICE INTERRUPTION RECORDS		SERVICE INTERRUPTION RECORDS
WATER QUALITY: SEWER JETTING AND VECTORING RECORDS		SEWER JETTING AND VECTORING RECORDS
WATER QUALITY: SLUDGE TREATMENT RECORDS Description modified to clarify that documentation is “conducted by or for agency.”		SLUDGE TREATMENT RECORDS
		SOLID WASTE CONVENIENCE CENTER FILE See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Discharge Monitoring Reports.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		SOLID WASTE MANAGEMENT VIOLATION RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Violations: Solid Waste Management.
		SOLID WASTE REPORTS (M) See General Record Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		SOLID WASTE SERVICE FILE See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Comprehensive Solid Waste Management Plan and Amendments AND General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records, Constituent Comments, Complaints, and Service Requests AND Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable.
	WATER QUALITY: STORMWATER DEVIATION PERMITS	

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		SURETY BOND INFORMATION (M) See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Bond Closing Records AND Bond Register AND Bonds, Notes, and Coupons.
UTILITIES: TAP AND HOOK UP RECORDS Confidentiality citation added: G.S. 132-1.1(c).		TAP AND HOOK UP RECORDS
EROSION CONTROL: TROUT BUFFER VARIANCES Cross-reference added to Program Records Schedule: Local Government Agencies, Standard 15 (Planning and Regulation of Development Records), Variances. Authority citation added: 15A NCAC 04B .0125		TROUT BUFFER VARIANCES (M)
ENVIRONMENTAL: REPORTS SUBMITTED TO U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA)		U.S. ENVIRONMENTAL PROTECTION AGENCY (EPA) REPORTS (M)
		VALVE OPERATION FILE (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Valve Operation File.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
WATER QUALITY: VIOLATION RECORDS		VIOLATION RECORDS (M)
		WASTE ELECTRONICS COLLECTION FILE (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Discharge Monitoring Reports.
		WASTE OIL COLLECTION FILE (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Discharge Monitoring Reports.
UTILITIES: WASTEWATER MAINTENANCE OPERATION REPORTS		WASTEWATER MAINTENANCE OPERATION REPORT (M)
		WASTEWATER POLLUTION CONTROL AND ABATEMENT RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Wastewater Pollution Control and Abatement Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		WASTEWATER QUALITY ANALYSIS RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Wastewater Quality Analysis Records.
		WATER ANALYSIS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Water Analysis.
		WATER AND SEWER PROJECTS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.
		WATER AND WASTEWATER FACILITY ENGINEERING AND SYSTEM PLANS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
UTILITIES: WATER AND WASTEWATER PERMITS AND APPROVAL RECORDS Order of dispositions reversed to place records for permanent value first.		WATER AND WASTEWATER PERMITS AND APPROVAL RECORDS (M)
WATER QUALITY: WATER AND WASTEWATER SYSTEM INSPECTIONS AND TESTS		WATER AND WASTEWATER SYSTEM INSPECTIONS AND TESTS (M)
		WATER AND WASTEWATER SYSTEM MAINTENANCE AND REPAIR RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.
		WATER AND WASTEWATER SYSTEM MANAGEMENT PLANS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS		
		WATER AND WASTEWATER SYSTEM PROJECT RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Utilities: Public Utilities System Engineering, Maintenance, and Repair Records.
		WATER CONSERVATION VIOLATION NOTICES (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Violations: Water Conservation.
		WATER STOCK PURCHASE RECORDS (M) See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Payable.
		WATER SYSTEM OPERATIONS RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Water System Operations Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>STANDARD 18: PUBLIC UTILITIES AND ENVIRONMENTAL/WASTE MANAGEMENT RECORDS</i>		
		WATER TANKS, SPECIFICATIONS, AND BOOSTER STATIONS FILE (M) See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement and Inspection Records), Water Tanks, Specifications, and Booster Stations File.
		WEIGH TICKETS/SCALE RECORDS (M) See Program Records Schedule: Local Government Agencies, Standard 18 (Public Utilities and Environmental/Waste Management Records), Environmental: Landfill Operational Plan.

SECTION 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS</i>		
APPRAISAL REPORTS Description for item now specifies that it covers “records appraising privately owned land for compensation in eminent domain projects.” Added cross-reference to General Records Schedule: Local Government Agencies, Standard 6 (Legal Records), Easements and Right-of-Way Records.		APPRAISAL REPORTS FILE
		COMPLIANCE RECORDS See Program Records Schedule: Local Government Agencies, Standard 19: Street Maintenance, Public Works, and Engineering Records), Project Records – Engineering and Compliance.
		EMERGENCY OPERATIONS PLANS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Disaster and Emergency Management Plans.
		ENVIRONMENTAL ASSESSMENT RECORDS See Program Records Schedule: Local Government Agencies, Standard 19 (Street Maintenance, Public Works, and Engineering Records), Project Records – Engineering and Compliance.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS</i>		
	INFRASTRUCTURE MAINTENANCE RECORDS FILE	MAINTENANCE RECORDS FILE
		PEST CONTROL RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Pest Control.
	PROJECT RECORDS: CANCELLED	PRE-PROJECT RECORDS
<p>PROJECT RECORDS – ENGINEERING AND COMPLIANCE This item now includes records previously found under Compliance Records and Environmental Assessment Records.</p> <p>Grants removed from description. Cross-reference added to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Grants, and Standard 2 (Budget, Fiscal, and Payroll Records), Grants: Financial.</p> <p>Payroll removed from description. Cross-reference added to General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Payroll and Earnings Records.</p>		PROJECT RECORDS – ENGINEERING

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS</i>		
		PROJECT RECORDS – WORK PAPERS Working Papers are public records, but they are no longer included on the schedule as the only records with long-term value are the final versions of the project records, as documented in Project Records – Cancelled, Project Records – Core, and Project Records – Engineering and Compliance.
		PROJECT TRACKING RECORDS When these records have long-term value, they are now consolidated into either Project Records – Cancelled, Project Records – Core, or Project Records – Engineering and Compliance.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS</i>		
<p>RIGHT-OF-WAY ACQUISITION WORKING RECORDS</p> <p>Includes working versions of items previously found under Right-of-Way Acquisition Records</p> <p>Cross-reference added to General Records Schedule: Local Government Agencies, Standard 6 (Legal Records), Easements and Right-of-Way Records.</p> <p>Final versions of Acquisition Records fall under the Easements and Right-of-Way Records in the General Records Schedule: Local Government Agencies; this item includes only working papers.</p> <p>Right-of-Way Acquisition Working Records have a retention period of three years rather than a permanent retention in office.</p>		<p>RIGHT-OF-WAY ACQUISITION RECORDS</p>
		<p>RIGHT-OF-WAY APPRAISAL RECORDS</p> <p>See General Records Schedule: Local Government Agencies Standard 6 (Legal Records), Easements and Right-of-Way Records.</p>

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS</i>		
		RIGHT-OF-WAY CORRESPONDENCE FILE See Program Records Schedule: Local Government Agencies, Standard 19 (Street Maintenance, Public Works, and Engineering Records), Right-of-Way Acquisition Working Records.
		STREET CLEANING RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies. Follow the disposition instructions under this item based on the kind of report generated by street cleaning efforts.
STRUCTURAL MAINTENANCE AND ANALYSIS RECORDS Disposition A modified to allow for destruction three years after the end of life of a permanent structure. Now includes a cross-reference to General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Blueprints and Specifications.		

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS</i>		
SURVEY FIELD RECORDS Records that do not have historical value are now to be retained until superseded or obsolete, rather than when reference value ends. Cross-reference added to General Records Schedule: Local Government Agencies, Standard 6 (Legal Records), Easements and Right-of-Way Records.		
		TESTING AND INSPECTION RECORDS See Program Records Schedule: Local Government Agencies, Standard 12 (Code Enforcement), Building and Road Permitting and Inspection Records.
		TRAFFIC ACCIDENT DATA FILE See General Records Schedule: Local Government Agencies, Standard 4 (Information Technology Records), Data Documentation Records.
	TRAFFIC VIDEO RECORDINGS AND DATA Includes the metadata generated by video recordings as well as the recordings themselves.	TRAFFIC CAMERA RECORDINGS
		TRAFFIC OPERATIONS PROGRAM FILE Records from the TOPICS program deleted from schedule as program is no longer active.

2021 LOCAL GOVERNMENT PROGRAM RECORDS RETENTION AND DISPOSITION SCHEDULE CHANGE LOG



CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>Standard 19: STREET MAINTENANCE, PUBLIC WORKS, AND ENGINEERING RECORDS</i>		
		TRAFFIC SIGNAL FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Vehicle, and Facility Usage Records.

STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
<i>STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)</i>		
		ABANDONED MOTOR VEHICLES (AMV) FILE See Auction Records.
		ACCREDITATION RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Accreditation Records.
		ACTIVITY REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
ALARM CALL REPORTS Amended description to include residences.		
		ALERTS FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Bulletins.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		AMBULANCE CALL RECORDS See Program Records Schedule for Local Government Agencies, Standard 13 (Emergency Medical Services and Fire Department Records), Ambulance Call Reports (ACR)/Patient Care Reports (PCR).
	ARREST PROCESSING RECORDS Merging of Arrest Processing: DWI Tracking Records and Arrest Processing: Tracking Records	
		AUTOMOBILES AND PROPERTY IN STORAGE: SALES AND REPORTS RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies, and Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable.
		BASIC TRAINING RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Law Enforcement Training.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		BICYCLE REGISTRATION See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Miscellaneous (Non-Building) Applications, Licenses, and Permits.
		BINGO LICENSURE RECORDS Original records created and retained by Department of Public Safety. For copies, see General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File.
		BREATHALYZER RECORDS See Chemical Analysis Records.
		CASE HISTORY FILE: CASES NOT OFFICIALLY INVESTIGATED Covered by various items on Law Enforcement standard of Local Government Program Schedule
DRUG AND ALCOHOL TESTING RECORDS Revised title and description to include DWI and Breathalyzer Records		

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		CITIZEN COMPLAINTS/ADMINISTRATIVE INVESTIGATION RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Constituent Comments, Complaints, Petitions, and Service Requests.
		COMMENDATION LETTERS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Service Awards and Commendations.
		COMMUNICATIONS RECORDS (REQUESTS AND RECEIPTS) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Requests for Information.
		CONFIDENTIAL FUNDS RECORDS See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Payable.
		CRIME PREVENTION RECORDS See Crime Analysis Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		CRIMINAL HISTORY RECORDS See Arrest Reports, Fingerprint Cards, and Identification Photographs.
		DAILY BULLETINS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Bulletins.
		DETENTION FACILITY INSPECTION REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Facility Maintenance, Repair, and Inspection Records.
DETENTION FACILITY INCIDENT REPORTS Title changed from INCIDENT REPORTS: DETENTION FACILITY		
DETENTION FACILITY PHYSICAL FORCE RECORDS Title changed from Physical Force Records		
		DOMESTIC VIOLENCE: ACTIVITY REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		DOMESTIC VIOLENCE CASE FILES: CLOSED (COPIES) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File. Original maintained by court system.
		DRIVER'S LICENSE REVOCATIONS FILE See respective case file related to revocation
		DRIVING WHILE IMPAIRED (DWI) REPORTS FILE See Chemical Analysis Records.
		DWI KNOLL MOTIONS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File. Original maintained by court system.
	ELECTRONIC RECORDINGS OF INTERROGATIONS	
		ELECTRONIC/VIDEO RECORDINGS OF INTERROGATIONS (HOMICIDE) See Electronic Recordings of Interrogations (Juvenile and Certain Felonies).

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		EMERGENCY ACTION RECORDS See General Records Schedule: Local Government Agencies, Standard 8 (Risk Management Records), Disaster and Emergency Management Plans.
		EQUIPMENT INVENTORY AND ISSUANCE RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Inventories.
		EXTRADITION CASE RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File. Original maintained by Office of the Governor.
		FALSE ALARM REPORTS AND VIOLATIONS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		FEDERAL FIREARMS NOTIFICATION RECORDS Copies. Originals maintained by federal government.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		FEDERAL FOREFEITURE RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Grants, and Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable and Grants: Financial.
FIELDS OBSERVATIONS Removed "Reports" from Title		
		FINGERPRINT CARDS (LATENT) See Fingerprint Cards.
		FIREARMS RANGE FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment, Facility, and Vehicle Usage Records.
		FIREARMS TRAINING RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Aptitude and Skills Testing Records and Standard 6: Law Enforcement Training.
		HANDGUN PERMITS See Permits: Concealed Weapons and Handguns.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		HOUSE AND SPECIAL CHECK REQUESTS See Incident Response Reports.
		IMMIGRATION AND CUSTOMS ENFORCEMENT (ICE DETAINEE RECORDS) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File. Original records maintained by County Sheriff's Department.
		INCIDENT REPORTS: DETENTION FACILITY See Incident Response Reports
INMATE DEATH REPORTS Renamed from Death of Inmate Reports		
INMATE INCARCERATION RECORDS Removed "(Active and Inactive)" from title.		
INMATE RESEARCH REQUESTS Changed Title from Inmate Law Library (Research) Requests		
		INTERNAL AFFAIRS CASE RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Administrative Investigations.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
	LABORATORY CASE RECORDS Included to cover investigative agencies which create and maintain laboratory records as part of criminal investigations. Records created and maintained separately from State Bureau of Identification.	
	LAW ENFORCEMENT AUDIO AND VIDEO RECORDINGS	
		LIST OF INMATE REPORTS Reports delivered to and maintained by Clerk of Superior Court
		MASTER INDEX FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Indices.
		MOBILE UNIT VIDEO TAPES See Law Enforcement Audio and Video Recordings.
		MODIFIED DIET REQUESTS (INMATES) See Inmate Meal Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		MONTHLY CONFINEMENT (JAIL) REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File. Original records by Department of Health and Human Services.
		MUTUAL AID AGREEMENT RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Dual Employment.
		OBSERVATION REPORTS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Training and Educational Records.
		PARKING METER RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Inventories.
		PARKING METER COLLECTIONS RECORDS See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Receivable.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		PAROLE COMMISSION NOTIFICATION REPORTS Records received and retained by North Carolina Post-Release Supervision & Parole Commission
PAWNSHOP RECORDS Title changed from Pawnshop Cards		
		PEER COUNSELING (LAW ENFORCEMENT) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Projects, Standard 1: Reports and Studies, and Standard 7 (Public Relations Records), Conferences and Workshops.
	PERMITS: CONCEALED WEAPONS AND HANDGUNS	
		PERSONAL HISTORIES OF KNOWN OR SUSPECTED LAW BREAKERS See Arrest Reports, Fingerprint Cards, and Identification Photographs.
		PERSONNEL INSPECTION REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		PHYSICAL FORCE RECORDS See Detention Facility Incident Reports.
		POLYGRAPH AND DRUG SCREENING PROGRAM See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
PROPERTY RECORDS Consolidated Confiscated, Evidence, Stolen/Recovered, and Unclaimed Property records		
		PURSUIT LOGS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		REIMBURSEMENT REQUESTS FOR INMATES CONFINED LOCALLY See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll Records), Accounts Payable.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		SHIFT ASSIGNMENT RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Work Schedules and Assignments.
		SPECIAL ORDER RECORDS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Policies and Procedures.
		SQUAD LEADER PROMOTION FILE See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Performance Reviews, and Standard 6: Position Evaluations.
		STATISTICAL REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		STOLEN MOTOR VEHICLES FILE See Case Files: Misdemeanors, Case Files: Felonies, and Incident Response Reports.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		TAXICAB INSPECTION AND LICENSING FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Miscellaneous (Non-Building) Applications, Licenses, and Permits.
		TOWED/SEIZED VEHICLE INVENTORIES See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Inventories.
		TRAFFIC CITATION AND PARKING TICKET, RECORDS OF DATES TURNED IN BY POLICE OFFICER See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		TRAFFIC STOP REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		TRAINEE INTERN PROGRAM FILE See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Internship Program.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		TRAINING ATTENDANCE FILE See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Training and Educational Records.
		TRAINING RECORDS See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Law Enforcement Training.
		TRAINING RECORDS: PERSONNEL See General Records Schedule: Local Government Agencies, Standard 4 (Human Resources Records), Training and Educational Records, and Standard 6: Law Enforcement Training.
		TRANSIENT SOLICITOR REGISTRATION FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Miscellaneous (Non-Building) Applications, Licenses, and Permits.
TRESPASS RECORDS Amended title and description. Adjusted disposition instructions.		

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		UNIFORM CRIME REPORTS (UCR) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		VEHICLE INSPECTION AND INVENTORY REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Equipment and Vehicle Maintenance, Repair, and Inspection Records.
		WANTED PERSONS FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Bulletins.
		WARNING TICKETS See Traffic Citations and Warnings.
		WARRANTS FILE See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reference (Reading) File. Official records are stored with the Administrative Office of the Courts.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 20: LAW ENFORCEMENT RECORDS (MUNICIPAL)		
		WARRANTS REGISTER See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		WORK RELEASE EARNINGS REPORTS See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
		WRECKER SERVICE RECORDS See Vehicle Towing Records.

STANDARD 21: TAX RECORDS (MUNICIPAL)

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 21: TAX RECORDS (MUNICIPAL)		
		ANNUAL REPORT ON PUBLIC DEPOSITS Record custodian is Department of the State Treasurer. Copies retained in municipal tax office are reference copies and may be destroyed at agency's discretion.
		ASSESSED VALUATION AND LEVIES REPORT Record custodian is North Carolina Department of Revenue. Copies retained in municipal tax office are reference copies and may be destroyed at agency's discretion.
	BEER AND WINE TAXES AND RECORDS	
		BICYCLE LICENSE RECEIPTS See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll records), Accounts Receivable.
		MOTOR VEHICLE LICENSE PLATE/DECAL RECORDS NC DMV has sole authority to issue motor vehicle license plates and decals. Series therefore removed from schedule.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 21: TAX RECORDS (MUNICIPAL)		
		MOTOR VEHICLE LICENSE RECEIPTS See General Records Schedule: Local Government Agencies, Standard 2 (Budget, Fiscal, and Payroll records), Accounts Receivable.
	MUNICIPAL VEHICLE TAX RECORDS	
PRIVILEGE LICENSES, TAXES, AND FEES RECORDS Includes privilege licenses, privilege license citation records, privilege tax ledgers, and privilege tax receipts. Applies only to general privilege tax items as authorized by G.S. 160A-194. Specific privilege licenses authorized by other statutes are found in Animal Licensing Records, Beer and Wine Taxes and Records, Municipal Vehicle Tax Records, and Taxicab and Limousine Tax Records.		PRIVILEGE LICENSES See Program Records Schedule: Local Government Agencies, Standard 21 (Tax Records), Privilege Licenses, Taxes, and Fees Records.
		PRIVILEGE LICENSE CITATION RECORDS See Program Records Schedule: Local Government Agencies, Standard 21 (Tax Records), Privilege Licenses, Taxes, and Fees Records.

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 21: TAX RECORDS (MUNICIPAL)		
		PRIVILEGE TAX LEDGER See Program Records Schedule: Local Government Agencies, Standard 21 (Tax Records), Privilege Licenses, Taxes, and Fees Records.
		PRIVILEGE TAX RECEIPTS See Program Records Schedule: Local Government Agencies, Standard 21 (Tax Records), Privilege Licenses, Taxes, and Fees Records.
		REPORTS OF TAXES COLLECTED (DAILY AND WEEKLY) See General Records Schedule: Local Government Agencies, Standard 1 (Administration and Management Records), Reports and Studies.
ROOM OCCUPANCY TAX RECORDS Phrase “by resolution” removed from item description to allow for broader application of item.		

CHANGES	NEW ITEMS	DISCONTINUED ITEMS
STANDARD 21: TAX RECORDS (MUNICIPAL)		
SCHEDULE “B” LICENSES Based on statute changes, description now specifies that this item only applies privilege licenses issued to attorneys-at-law and other professionals, installment paper dealers, and pawnbrokers. Authority and confidentiality statutes added. Disposition wording changed for clarity and to allow for destruction of non-specified items at the end of their reference value. Disposition also changed to retain all settlement records for three years rather than only “detailed” settlements.		
TAX EXEMPT PROPERTY FILE Disposition changed to ensure that records are kept so long as property exemption remains in effect. New disposition requires retaining exemption records for five years after expiration of exemption or end of life of the structure.		
TAX LEDGER CARDS OR SHEETS Disposition changed to “destroy in office 5 years after superseded or obsolete.”		
		TAX RECEIPT BOOK
		TAX SALES CERTIFICATES Item discontinued, as it is no longer applicable.
	TAXICAB AND LIMOUSINE TAX RECORDS	



Union County, NC

Staff Report

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

File #: 25-652

Agenda Date: 10/20/2025

TITLE:

Tax Bill Correction Report for September 2025

INFORMATION CONTACT:

Michael Thompson, Tax Administration, Deputy Tax Administrator, 704-283-3624

ACTION REQUESTED:

Tax Bill Correction Reports for September 2025

PRIOR BOARD ACTIONS:

None

BACKGROUND:

In accordance with North Carolina General Statutes 102-312 and 105-325, the Board of County Commissioners is authorized to make and approve certain changes to property tax records. Approval of such changes may result in either a release, refund, or discovery of ad valorem taxes. The attached report provides detailed information on all tax bills that were modified. Included in the report for each correction is the parcel number or property key, owner name, reason for the change, original value, original tax, corrected value, corrected tax, and refund, if applicable.

FINANCIAL IMPACT:

September Refund amount = \$7258.82

Correction Listing Report

Union County

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Date Posted between 9/1/2025 and 9/30/2025

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000911	04060007	RE	2025	WHITLEY, JUDITH	9/30/2025	Value	184,183	215,130	30,947		EXCLUSION STATUS CHANGE
Public Notes:						Tax	880.76	1,028.75	147.99		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	880.76	1,028.75	147.99	0.00	
2025000942	06204278	RE	2025	FARENGA, ANTHONY	9/30/2025	Value	911,766	989,566	77,800		EXCLUSION STATUS CHANGE
Public Notes:						Tax	4,236.07	4,597.53	361.46		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,236.07	4,597.53	361.46	0.00	
2025000727	07135079	RE	2025	STONE, BONITA K	9/16/2025	Value	150,505	160,405	9,900		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	978.88	1,043.27	64.39		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	978.88	1,043.27	64.39	0.00	
2025000872	09301079	RE	2025	KEZIAH, RONDA H	9/29/2025	Value	150,160	300,300	150,140		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,312.70	2,625.22	1,312.52		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,312.70	2,625.22	1,312.52	0.00	
2025000872	09301079	RE	2024	KEZIAH, RONDA H	9/29/2025	Value	88,900	177,800	88,900		EXCLUSION STATUS CHANGE
Public Notes:						Tax	969.46	1,938.91	969.45		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	969.46	1,938.91	969.45	0.00	
2025000631	09316001	RE	2025	HOWARD, EMMA P	9/12/2025	Value	226,664	259,614	32,950		EXCLUSION STATUS CHANGE
Public Notes:						Tax	1,096.60	1,256.01	159.41		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,096.60	1,256.01	159.41	0.00	

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Union County

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Date Posted between 9/1/2025 and 9/30/2025

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000855	K8288003J	RE	2025	MCVICKERS, VIRGINIA PHILLI	9/29/2025	Value	0	75,400	75,400		CLERICAL ERROR
Public Notes:						Tax	0.00	359.59	359.59		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	359.59	359.59	0.00	
Totals for Type Exclusion Change - Discovery :						Value	1,712,178	2,178,215	466,037		
						Tax	9,474.47	12,849.28	3,374.81		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,474.47	12,849.28	3,374.81	0.00	

Correction Type : Exclusion Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000634	02186014B	RE	2025	COVINGTON, GEORGIA GRADY & COVINGTON, LOUISA	9/12/2025	Value	186,240	161,850	(24,390)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	928.97	807.31	(121.66)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	928.97	807.31	(121.66)	0.00	

Correction Listing Report

Union County

Date Posted between 9/1/2025 and 9/30/2025

Correction Type : Exclusion Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000635	09216664	RE	2025	NIRAULA, ANJANA	9/15/2025	Value	396,800	351,800	(45,000)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	3,468.83	3,075.44	(393.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,468.83	3,075.44	(393.39)	0.00	
Totals for Type Exclusion Change - Release :						Value	583,040	513,650	(69,390)		
						Tax	4,397.80	3,882.75	(515.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,397.80	3,882.75	(515.05)	0.00	

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000720	02180018	RE	2025	HAIGLER, POLLY GORDON	9/16/2025	Value	371,700	500,400	128,700		PUV ROLLBACK
Public Notes:						Tax	1,862.96	2,508.00	645.04		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,862.96	2,508.00	645.04	0.00	
2025000720	02180018	RE	2024	HAIGLER, POLLY GORDON	9/16/2025	Value	312,100	369,900	57,800		PUV ROLLBACK
Public Notes:						Tax	2,064.86	2,447.26	382.40		
						LL	0.00	0.00	0.00		
						INT	0.00	30.59	30.59		
						Tax TTL	2,064.86	2,477.85	412.99	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000720	02180018	RE	2023	HAIGLER, POLLY GORDON	9/16/2025	Value	312,100	369,900	57,800		PUV ROLLBACK
Public Notes:						Tax	2,044.56	2,423.21	378.65		
						LL	0.00	0.00	0.00		
						INT	0.00	64.37	64.37		
						Tax TTL	2,044.56	2,487.58	443.02	0.00	
2025000720	02180018	RE	2022	HAIGLER, POLLY GORDON	9/16/2025	Value	312,100	369,900	57,800		PUV ROLLBACK
Public Notes:						Tax	2,044.56	2,423.21	378.65		
						LL	0.00	0.00	0.00		
						INT	0.00	98.45	98.45		
						Tax TTL	2,044.56	2,521.66	477.10	0.00	
2025000352	04069008	RE	2025	FUNDERBURK, L THEODORE	9/2/2025	Value	219,000	233,050	14,050		PUV ROLLBACK
Public Notes:						Tax	1,047.26	1,114.45	67.19		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,047.26	1,114.45	67.19	0.00	
2025000353	04069008	RE	2025	FUNDERBURK, L THEODORE	9/2/2025	Value	233,050	292,180	59,130		PUV ROLLBACK
Public Notes:						Tax	1,114.45	1,397.21	282.76		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,114.45	1,397.21	282.76	0.00	
2025000353	04069008	RE	2024	FUNDERBURK, L THEODORE	9/2/2025	Value	172,030	202,470	30,440		PUV ROLLBACK
Public Notes:						Tax	1,098.93	1,293.38	194.45		
						LL	0.00	0.00	0.00		
						INT	0.00	15.56	15.56		
						Tax TTL	1,098.93	1,308.94	210.01	0.00	
2025000352	04069008	RE	2024	FUNDERBURK, L THEODORE	9/2/2025	Value	164,800	172,030	7,230		PUV ROLLBACK
Public Notes:						Tax	1,052.74	1,098.93	46.19		
						LL	0.00	0.00	0.00		
						INT	0.00	3.69	3.69		
						Tax TTL	1,052.74	1,102.62	49.88	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000352	04069008	RE	2023	FUNDERBURK, L THEODORE	9/2/2025	Value	164,800	172,030	7,230		PUV ROLLBACK
Public Notes:						Tax	1,026.37	1,071.40	45.03		
						LL	0.00	0.00	0.00		
						INT	0.00	7.65	7.65		
						Tax TTL	1,026.37	1,079.05	52.68	0.00	
2025000353	04069008	RE	2023	FUNDERBURK, L THEODORE	9/2/2025	Value	172,030	202,470	30,440		PUV ROLLBACK
Public Notes:						Tax	1,071.40	1,260.98	189.58		
						LL	0.00	0.00	0.00		
						INT	0.00	32.23	32.23		
						Tax TTL	1,071.40	1,293.21	221.81	0.00	
2025000352	04069008	RE	2022	FUNDERBURK, L THEODORE	9/2/2025	Value	164,800	172,030	7,230		PUV ROLLBACK
Public Notes:						Tax	1,026.37	1,071.40	45.03		
						LL	0.00	0.00	0.00		
						INT	0.00	11.71	11.71		
						Tax TTL	1,026.37	1,083.11	56.74	0.00	
2025000353	04069008	RE	2022	FUNDERBURK, L THEODORE	9/2/2025	Value	172,030	202,470	30,440		PUV ROLLBACK
Public Notes:						Tax	1,071.40	1,260.98	189.58		
						LL	0.00	0.00	0.00		
						INT	0.00	49.29	49.29		
						Tax TTL	1,071.40	1,310.27	238.87	0.00	
2025000722	08120019C	RE	2025	MC GEE, MILDRED H	9/16/2025	Value	6,000	54,120	48,120		PUV ROLLBACK
Public Notes:						Tax	30.64	276.39	245.75		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	30.64	276.39	245.75	0.00	
2025000722	08120019C	RE	2024	MC GEE, MILDRED H	9/16/2025	Value	6,000	33,930	27,930		PUV ROLLBACK
Public Notes:						Tax	40.11	226.82	186.71		
						LL	0.00	0.00	0.00		
						INT	0.00	14.93	14.93		
						Tax TTL	40.11	241.75	201.64	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000722	08120019C	RE	2023	MC GEE, MILDRED H	9/16/2025	Value	6,000	33,930	27,930		PUV ROLLBACK
Public Notes:						Tax	39.50	223.36	183.86		
						LL	0.00	0.00	0.00		
						INT	0.00	31.26	31.26		
						Tax TTL	39.50	254.62	215.12	0.00	
2025000722	08120019C	RE	2022	MC GEE, MILDRED H	9/16/2025	Value	6,000	33,930	27,930		PUV ROLLBACK
Public Notes:						Tax	39.50	223.36	183.86		
						LL	0.00	0.00	0.00		
						INT	0.00	47.81	47.81		
						Tax TTL	39.50	271.17	231.67	0.00	
2025000721	08225012C	RE	2025	PRICE, RODD CAMERON & PRICE, RITA D	9/16/2025	Value	96,900	267,370	170,470		PUV ROLLBACK
Public Notes:						Tax	494.87	1,365.46	870.59		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	494.87	1,365.46	870.59	0.00	
2025000721	08225012C	RE	2024	PRICE, RODD CAMERON & PRICE, RITA D	9/16/2025	Value	60,900	141,740	80,840		PUV ROLLBACK
Public Notes:						Tax	407.11	947.53	540.42		
						LL	0.00	0.00	0.00		
						INT	0.00	43.24	43.24		
						Tax TTL	407.11	990.77	583.66	0.00	
2025000721	08225012C	RE	2023	PRICE, RODD CAMERON & PRICE, RITA D	9/16/2025	Value	60,900	141,740	80,840		PUV ROLLBACK
Public Notes:						Tax	400.91	933.08	532.17		
						LL	0.00	0.00	0.00		
						INT	0.00	90.47	90.47		
						Tax TTL	400.91	1,023.55	622.64	0.00	
2025000721	08225012C	RE	2022	PRICE, RODD CAMERON & PRICE, RITA D	9/16/2025	Value	60,900	141,740	80,840		PUV ROLLBACK
Public Notes:						Tax	400.91	933.08	532.17		
						LL	0.00	0.00	0.00		
						INT	0.00	138.36	138.36		
						Tax TTL	400.91	1,071.44	670.53	0.00	

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Date Posted between 9/1/2025 and 9/30/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000789	08294059A	RE	2025	ROWELL, DOUGLAS D	9/19/2025	Value	75,800	1,004,500	928,700		PUV ROLLBACK
Public Notes:						Tax	370.06	4,903.97	4,533.91		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	370.06	4,903.97	4,533.91	0.00	
2025000789	08294059A	RE	2024	ROWELL, DOUGLAS D	9/19/2025	Value	133,500	459,500	326,000		PUV ROLLBACK
Public Notes:						Tax	875.36	3,012.94	2,137.58		
						LL	0.00	0.00	0.00		
						INT	0.00	171.00	171.00		
						Tax TTL	875.36	3,183.94	2,308.58	0.00	
2025000789	08294059A	RE	2023	ROWELL, DOUGLAS D	9/19/2025	Value	133,500	459,500	326,000		PUV ROLLBACK
Public Notes:						Tax	866.95	2,983.99	2,117.04		
						LL	0.00	0.00	0.00		
						INT	0.00	359.90	359.90		
						Tax TTL	866.95	3,343.89	2,476.94	0.00	
2025000789	08294059A	RE	2022	ROWELL, DOUGLAS D	9/19/2025	Value	133,500	459,500	326,000		PUV ROLLBACK
Public Notes:						Tax	866.95	2,983.99	2,117.04		
						LL	0.00	0.00	0.00		
						INT	0.00	550.43	550.43		
						Tax TTL	866.95	3,534.42	2,667.47	0.00	
2025000364	09289003	RE	2025	PATTERSON, HELEN PARKER HE	9/3/2025	Value	20,900	388,700	367,800		PUV ROLLBACK
Public Notes:						Tax	94.36	1,754.98	1,660.62		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	94.36	1,754.98	1,660.62	0.00	
2025000364	09289003	RE	2024	PATTERSON, HELEN PARKER HE	9/3/2025	Value	20,900	196,300	175,400		PUV ROLLBACK
Public Notes:						Tax	127.68	1,199.20	1,071.52		
						LL	0.00	0.00	0.00		
						INT	0.00	85.72	85.72		
						Tax TTL	127.68	1,284.92	1,157.24	0.00	

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Date Posted between 9/1/2025 and 9/30/2025

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000364	09289003	RE	2023	PATTERSON, HELEN PARKER HE	9/3/2025	Value	20,900	196,300	175,400		PUV ROLLBACK
Public Notes:						Tax	127.07	1,193.50	1,066.43		
						LL	0.00	0.00	0.00		
						INT	0.00	181.29	181.29		
						Tax TTL	127.07	1,374.79	1,247.72	0.00	
2025000364	09289003	RE	2022	PATTERSON, HELEN PARKER HE	9/3/2025	Value	20,900	196,300	175,400		PUV ROLLBACK
Public Notes:						Tax	127.07	1,193.50	1,066.43		
						LL	0.00	0.00	0.00		
						INT	0.00	277.27	277.27		
						Tax TTL	127.07	1,470.77	1,343.70	0.00	
2025000363	09330003	RE	2025	PATTERSON, HELEN PARKER HE	9/3/2025	Value	15,200	421,200	406,000		PUV ROLLBACK
Public Notes:						Tax	68.63	1,901.72	1,833.09		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	68.63	1,901.72	1,833.09	0.00	
2025000363	09330003	RE	2024	PATTERSON, HELEN PARKER HE	9/3/2025	Value	15,100	224,500	209,400		PUV ROLLBACK
Public Notes:						Tax	92.25	1,371.47	1,279.22		
						LL	0.00	0.00	0.00		
						INT	0.00	102.33	102.33		
						Tax TTL	92.25	1,473.80	1,381.55	0.00	
2025000363	09330003	RE	2023	PATTERSON, HELEN PARKER HE	9/3/2025	Value	15,100	224,500	209,400		PUV ROLLBACK
Public Notes:						Tax	91.81	1,364.96	1,273.15		
						LL	0.00	0.00	0.00		
						INT	0.00	216.43	216.43		
						Tax TTL	91.81	1,581.39	1,489.58	0.00	
2025000363	09330003	RE	2022	PATTERSON, HELEN PARKER HE	9/3/2025	Value	15,100	224,500	209,400		PUV ROLLBACK
Public Notes:						Tax	91.81	1,364.96	1,273.15		
						LL	0.00	0.00	0.00		
						INT	0.00	331.02	331.02		
						Tax TTL	91.81	1,695.98	1,604.17	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000781	09372004 80	RE	2025	PLYLER, JOHN DANIEL	9/18/2025	Value	595,300	762,700	167,400		PUV ROLLBACK
Public Notes:						Tax	5,204.11	6,667.52	1,463.41		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,204.11	6,667.52	1,463.41	0.00	
2025000781	09372004 80	RE	2024	PLYLER, JOHN DANIEL	9/18/2025	Value	381,000	459,300	78,300		PUV ROLLBACK
Public Notes:						Tax	4,154.81	5,008.67	853.86		
						LL	0.00	0.00	0.00		
						INT	0.00	68.31	68.31		
						Tax TTL	4,154.81	5,076.98	922.17	0.00	
2025000781	09372004 80	RE	2023	PLYLER, JOHN DANIEL	9/18/2025	Value	381,000	459,300	78,300		PUV ROLLBACK
Public Notes:						Tax	4,154.81	5,008.67	853.86		
						LL	0.00	0.00	0.00		
						INT	0.00	145.16	145.16		
						Tax TTL	4,154.81	5,153.83	999.02	0.00	
2025000781	09372004 80	RE	2022	PLYLER, JOHN DANIEL	9/18/2025	Value	381,000	459,300	78,300		PUV ROLLBACK
Public Notes:						Tax	4,154.81	5,008.67	853.86		
						LL	0.00	0.00	0.00		
						INT	0.00	222.01	222.01		
						Tax TTL	4,154.81	5,230.68	1,075.87	0.00	
2025000782	09372004 90	RE	2025	PLYLER, JOHN DANIEL	9/18/2025	Value	10,100	2,074,900	2,064,800		PUV ROLLBACK
Public Notes:						Tax	48.87	10,038.37	9,989.50		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	48.87	10,038.37	9,989.50	0.00	
2025000782	09372004 90	RE	2024	PLYLER, JOHN DANIEL	9/18/2025	Value	10,000	1,407,300	1,397,300		PUV ROLLBACK
Public Notes:						Tax	65.18	9,172.78	9,107.60		
						LL	0.00	0.00	0.00		
						INT	0.00	728.61	728.61		
						Tax TTL	65.18	9,901.39	9,836.21	0.00	

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000782	09372004 90	RE	2023	PLYLER, JOHN DANIEL	9/18/2025	Value	445,970	1,800,000	1,354,030		PUV ROLLBACK
Public Notes:						Tax	2,855.10	11,523.60	8,668.50		
						LL	0.00	0.00	0.00		
						INT	0.00	1,473.65	1,473.65		
						Tax TTL	2,855.10	12,997.25	10,142.15	0.00	
2025000782	09372004 90	RE	2022	PLYLER, JOHN DANIEL	9/18/2025	Value	379,170	1,800,000	1,420,830		PUV ROLLBACK
Public Notes:						Tax	2,359.58	11,201.41	8,841.83		
						LL	0.00	0.00	0.00		
						INT	0.00	2,298.88	2,298.88		
						Tax TTL	2,359.58	13,500.29	11,140.71	0.00	
Totals for Type PUV Rollback :						Value	6,278,080	17,785,430	11,507,350		
						Tax	45,176.68	113,358.36	68,181.68		
						LL	0.00	0.00	0.00		
						INT	0.00	7,891.62	7,891.62		
						Tax TTL	45,176.68	121,249.98	76,073.30	0.00	

Correction Type : Tax Type Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000838	389570	PP	2025	SPARKMAN, LAURA JEAN	9/25/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000823	640886	PP	2025	VRG COMPONENTS INC	9/25/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
2025000826	644791	PP	2025	MCATEER TOWING SERVICES LL	9/25/2025	Value	0	0	0		CLERICAL ERROR
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
2025000806	644961	PP	2025	RHOADS, DAPHNIE BEAR & RHOADS, JACOB KEITH	9/24/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
2025000847	657567	PP	2025	BAKER, JOE EDWARD JR	9/26/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
2025000733	663980	PP	2025	BROWN, DARIUS RHASHIN	9/16/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	

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Correction Type : Tax Type Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000733	663980	PP	2024	BROWN, DARIUS RHASHIN	9/16/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
Totals for Type Tax Type Change - Discovery :						Value	0	0	0		
						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	

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Correction Type : Tax Type Change - Non-Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000407	07027023	RE	2025	RORIE, JOSEPH CLAY & RORIE, JOSIE H	9/5/2025	Value	0	0	0		TAX CODE CHANGE
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
	Totals for Type Tax Type Change - Non-Discovery :					Value	0	0	0		
					Tax	0.00	0.00	0.00			
					LL	0.00	0.00	0.00			
					INT	0.00	0.00	0.00			
					Tax TTL	0.00	0.00	0.00	0.00	0.00	

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000723	01144027	RE	2024	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	35,000	35,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	226.38	226.38		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	226.38	226.38	0.00	
2025000723	01144027	RE	2023	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	35,000	35,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	219.24	219.24		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	219.24	219.24	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000723	01144027	RE	2022	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	35,000	35,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	219.24	219.24		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	219.24	219.24	0.00	
2025000723	01144027	RE	2021	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	35,000	35,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	219.66	219.66		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	219.66	219.66	0.00	
2025000723	01144027	RE	2020	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	44,900	44,900		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	353.72	353.72		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	353.72	353.72	0.00	
2025000379	01186017	RE	2024	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	23,300	23,300		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	150.70	150.70		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	150.70	150.70	0.00	
2025000379	01186017	RE	2023	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	23,300	23,300		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	145.95	145.95		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	145.95	145.95	0.00	
2025000379	01186017	RE	2022	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	23,300	23,300		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	145.95	145.95		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	145.95	145.95	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000379	01186017	RE	2021	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	23,300	23,300		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	146.23	146.23		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	146.23	146.23	0.00	
2025000633	02186014B	RE	2025	COVINGTON, GEORGIA GRADY & COVINGTON, LOUISA	9/12/2025	Value	137,440	186,240	48,800		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	685.55	928.97	243.42		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	685.55	928.97	243.42	0.00	
2025000724	02311040	RE	2024	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	1,034,000	1,034,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	12,527.94	12,527.94		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	12,527.94	12,527.94	0.00	
2025000724	02311040	RE	2023	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	1,034,000	1,034,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	11,840.33	11,840.33		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11,840.33	11,840.33	0.00	
2025000724	02311040	RE	2022	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	1,034,000	1,034,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	11,840.33	11,840.33		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11,840.33	11,840.33	0.00	
2025000724	02311040	RE	2021	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	1,034,000	1,034,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	11,812.42	11,812.42		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11,812.42	11,812.42	0.00	

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2025000724	02311040	RE	2020	CSL NORTH CAROLINA SYSTEM	9/16/2025	Value	0	952,500	952,500		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	12,622.53	12,622.53		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	12,622.53	12,622.53	0.00	
2025000859	06066106	RE	2025	CAMPBELL, SOPHIA & CAMPBELL, FRANK H	9/29/2025	Value	899,900	900,600	700		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,495.90	4,499.40	3.50		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,495.90	4,499.40	3.50	0.00	
2025000421	06096017A	RE	2025	WEGERT, SAMUEL ERWIN & WEGERT, RACHEL DAWN	9/5/2025	Value	1,201,500	1,632,500	431,000		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	6,002.69	8,155.97	2,153.28		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,002.69	8,155.97	2,153.28	0.00	
2025000684	06096031B	RE	2025	FOUR CORNERS OF CHARLOTTE	9/15/2025	Value	536,000	646,800	110,800		SQUARE FOOTAGE
Public Notes:						Tax	2,677.86	3,231.41	553.55		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,677.86	3,231.41	553.55	0.00	
2025000380	07003003	RE	2024	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	115,500	115,500		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	951.95	951.95		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	951.95	951.95	0.00	
2025000380	07003003	RE	2023	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	115,500	115,500		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	943.75	943.75		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	943.75	943.75	0.00	

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2025000380	07003003	RE	2022	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	115,500	115,500		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	943.75	943.75		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	943.75	943.75	0.00	
2025000380	07003003	RE	2021	TIME WARNER CABLE SOUTHEAS	9/4/2025	Value	0	115,500	115,500		EXEMPTION STATUS CHANGE
Public Notes:						Tax	0.00	943.75	943.75		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	943.75	943.75	0.00	
2025000408	07027023	RE	2025	RORIE, JOSEPH CLAY & RORIE, JOSIE H	9/5/2025	Value	0	718,400	718,400		TAX CODE CHANGE
Public Notes:						Tax	0.00	3,475.62	3,475.62		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	3,475.62	3,475.62	0.00	
2025000736	07066407	RE	2024	CSL, NORTH CAROLINA SYSTEM	9/17/2025	Value	0	2,900	2,900		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	23.90	23.90		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	23.90	23.90	0.00	
2025000736	07066407	RE	2023	CSL, NORTH CAROLINA SYSTEM	9/17/2025	Value	0	2,900	2,900		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	23.70	23.70		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	23.70	23.70	0.00	
2025000736	07066407	RE	2022	CSL, NORTH CAROLINA SYSTEM	9/17/2025	Value	0	2,900	2,900		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	23.70	23.70		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	23.70	23.70	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000736	07066407	RE	2021	CSL, NORTH CAROLINA SYSTEM	9/17/2025	Value	0	2,900	2,900		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	23.70	23.70		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	23.70	23.70	0.00	
2025000736	07066407	RE	2020	CSL, NORTH CAROLINA SYSTEM	9/17/2025	Value	0	1,200	1,200		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	11.58	11.58		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11.58	11.58	0.00	
2025000737	07114060	RE	2024	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	78,200	78,200		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	646.32	646.32		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	646.32	646.32	0.00	
2025000737	07114060	RE	2023	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	79,800	79,800		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	655.00	655.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	655.00	655.00	0.00	
2025000737	07114060	RE	2022	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	79,800	79,800		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	655.00	655.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	655.00	655.00	0.00	
2025000737	07114060	RE	2021	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	79,800	79,800		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	654.52	654.52		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	654.52	654.52	0.00	

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2025000737	07114060	RE	2020	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	71,000	71,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	689.20	689.20		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	689.20	689.20	0.00	
2025000738	09022117	RE	2024	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	89,600	89,600		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	908.10	908.10		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	908.10	908.10	0.00	
2025000738	09022117	RE	2023	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	89,600	89,600		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	891.52	891.52		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	891.52	891.52	0.00	
2025000738	09022117	RE	2022	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	89,600	89,600		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	891.52	891.52		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	891.52	891.52	0.00	
2025000738	09022117	RE	2021	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	89,600	89,600		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	890.89	890.89		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	890.89	890.89	0.00	
2025000738	09022117	RE	2020	CSL NORTH CAROLINA SYSTEM	9/17/2025	Value	0	97,400	97,400		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	1,210.29	1,210.29		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,210.29	1,210.29	0.00	

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2025000943	09156031	RE	2025	RHGC, INVESTMENTS LLC	9/30/2025	Value	3,117,200	3,249,400	132,200		CHANGE VALUE PER BER
Public Notes:						Tax	27,250.56	28,406.25	1,155.69		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	27,250.56	28,406.25	1,155.69	0.00	
2025000698	09273007	RE	2025	KERR, DANA ATCHLEY & KERR, JAMES M	9/15/2025	Value	302,800	320,600	17,800		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,647.07	2,802.69	155.62		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,647.07	2,802.69	155.62	0.00	
2025000801	376977	PP	2025	PRICE, MAX ALLAN	9/23/2025	Value	4,171	9,871	5,700		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	19.89	47.07	27.18		
						LL	1.99	4.71	2.72		
						INT	0.00	0.00	0.00		
						Tax TTL	21.88	51.78	29.90	0.00	
2025000840	389570	PP	2025	SPARKMAN, LAURA JEAN	9/25/2025	Value	0	3,691	3,691		TAX CODE CHANGE
Public Notes:						Tax	0.00	18.68	18.68		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	18.68	18.68	0.00	
2025000874	406948	PP	2025	ADVANCED DIGITAL TEXTILES	9/29/2025	Value	1,286,351	1,951,820	665,469		TMA AUDIT DISCOVERY
Public Notes:						Tax	11,245.28	17,062.81	5,817.53		
						LL	0.00	581.75	581.75		
						INT	0.00	0.00	0.00		
						Tax TTL	11,245.28	17,644.56	6,399.28	0.00	
2025000854	406948	PP	2024	ADVANCED DIGITAL TEXTILES	9/29/2025	Value	716,239	1,455,684	739,445		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,810.59	15,874.23	8,063.64		
						LL	0.00	1,612.73	1,612.73		
						INT	0.00	0.00	0.00		
						Tax TTL	7,810.59	17,486.96	9,676.37	0.00	

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2025000854	406948	PP	2023	ADVANCED DIGITAL TEXTILES	9/29/2025	Value	773,732	1,669,059	895,327		TMA AUDIT DISCOVERY
Public Notes:						Tax	8,437.55	18,201.09	9,763.54		
						LL	0.00	2,929.06	2,929.06		
						INT	0.00	0.00	0.00		
						Tax TTL	8,437.55	21,130.15	12,692.60	0.00	
2025000854	406948	PP	2022	ADVANCED DIGITAL TEXTILES	9/29/2025	Value	895,126	1,265,786	370,660		TMA AUDIT DISCOVERY
Public Notes:						Tax	9,761.35	13,803.40	4,042.05		
						LL	976.14	2,592.96	1,616.82		
						INT	0.00	0.00	0.00		
						Tax TTL	10,737.49	16,396.36	5,658.87	0.00	
2025000854	406948	PP	2021	ADVANCED DIGITAL TEXTILES	9/29/2025	Value	673,732	1,023,907	350,175		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,347.05	11,165.71	3,818.66		
						LL	0.00	1,909.33	1,909.33		
						INT	0.00	0.00	0.00		
						Tax TTL	7,347.05	13,075.04	5,727.99	0.00	
2025000854	406948	PP	2020	ADVANCED DIGITAL TEXTILES	9/29/2025	Value	537,648	734,664	197,016		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,243.19	9,897.39	2,654.20		
						LL	724.32	2,316.85	1,592.53		
						INT	0.00	0.00	0.00		
						Tax TTL	7,967.51	12,214.24	4,246.73	0.00	
2025000730	407201	PP	2024	ARBOR FIELDS INC	9/16/2025	Value	383,723	397,961	14,238		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,584.37	2,680.27	95.90		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,584.37	2,680.27	95.90	0.00	
2025000730	407201	PP	2023	ARBOR FIELDS INC	9/16/2025	Value	355,590	372,647	17,057		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,329.11	2,440.84	111.73		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,329.11	2,440.84	111.73	0.00	

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2025000730	407201	PP	2022	ARBOR FIELDS INC	9/16/2025	Value	240,130	254,219	14,089		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,572.85	1,665.13	92.28		
						LL	157.29	157.29	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,730.14	1,822.42	92.28	0.00	
2025000362	407238	PP	2024	ARTISAN SHUTTER INC	9/3/2025	Value	794,762	804,064	9,302		TMA AUDIT DISCOVERY
Public Notes:						Tax	6,650.57	6,728.41	77.84		
						LL	0.00	15.57	15.57		
						INT	0.00	0.00	0.00		
						Tax TTL	6,650.57	6,743.98	93.41	0.00	
2025000362	407238	PP	2023	ARTISAN SHUTTER INC	9/3/2025	Value	659,548	871,178	211,630		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,442.59	7,188.96	1,746.37		
						LL	0.00	523.91	523.91		
						INT	0.00	0.00	0.00		
						Tax TTL	5,442.59	7,712.87	2,270.28	0.00	
2025000362	407238	PP	2022	ARTISAN SHUTTER INC	9/3/2025	Value	114,225	741,108	626,883		TMA AUDIT DISCOVERY
Public Notes:						Tax	922.14	5,982.96	5,060.82		
						LL	0.00	2,024.33	2,024.33		
						INT	0.00	0.00	0.00		
						Tax TTL	922.14	8,007.29	7,085.15	0.00	
2025000362	407238	PP	2021	ARTISAN SHUTTER INC	9/3/2025	Value	119,646	269,838	150,192		TMA AUDIT DISCOVERY
Public Notes:						Tax	964.94	2,176.24	1,211.30		
						LL	0.00	605.65	605.65		
						INT	0.00	0.00	0.00		
						Tax TTL	964.94	2,781.89	1,816.95	0.00	
2025000362	407238	PP	2020	ARTISAN SHUTTER INC	9/3/2025	Value	118,453	269,288	150,835		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,147.81	2,609.40	1,461.59		
						LL	0.00	876.95	876.95		
						INT	0.00	0.00	0.00		
						Tax TTL	1,147.81	3,486.35	2,338.54	0.00	

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2025000731	407490	PP	2024	BARTLETT CONTROLS INC	9/16/2025	Value	61,446	66,253	4,807		TMA AUDIT DISCOVERY
Public Notes:						Tax	630.01	679.29	49.28		
						LL	63.00	72.86	9.86		
						INT	0.00	0.00	0.00		
						Tax TTL	693.01	752.15	59.14	0.00	
2025000731	407490	PP	2023	BARTLETT CONTROLS INC	9/16/2025	Value	68,776	74,539	5,763		TMA AUDIT DISCOVERY
Public Notes:						Tax	698.01	756.50	58.49		
						LL	0.00	17.55	17.55		
						INT	0.00	0.00	0.00		
						Tax TTL	698.01	774.05	76.04	0.00	
2025000731	407490	PP	2022	BARTLETT CONTROLS INC	9/16/2025	Value	80,995	91,305	10,310		TMA AUDIT DISCOVERY
Public Notes:						Tax	822.02	926.65	104.63		
						LL	0.00	41.86	41.86		
						INT	0.00	0.00	0.00		
						Tax TTL	822.02	968.51	146.49	0.00	
2025000731	407490	PP	2021	BARTLETT CONTROLS INC	9/16/2025	Value	78,314	91,003	12,689		TMA AUDIT DISCOVERY
Public Notes:						Tax	793.56	922.13	128.57		
						LL	0.00	64.29	64.29		
						INT	0.00	0.00	0.00		
						Tax TTL	793.56	986.42	192.86	0.00	
2025000731	407490	PP	2020	BARTLETT CONTROLS INC	9/16/2025	Value	86,692	97,114	10,422		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,013.00	1,134.78	121.78		
						LL	0.00	73.07	73.07		
						INT	0.00	0.00	0.00		
						Tax TTL	1,013.00	1,207.85	194.85	0.00	
2025000849	408000	PP	2022	C TABONY VETERINARY RELIEF	9/26/2025	Value	259,423	285,406	25,983		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,129.34	2,342.61	213.27		
						LL	0.00	85.31	85.31		
						INT	0.00	0.00	0.00		
						Tax TTL	2,129.34	2,427.92	298.58	0.00	

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2025000849	408000	PP	2021	C TABONY VETERINARY RELIEF	9/26/2025	Value	256,853	302,316	45,463		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,106.71	2,479.60	372.89		
						LL	0.00	186.45	186.45		
						INT	0.00	0.00	0.00		
						Tax TTL	2,106.71	2,666.05	559.34	0.00	
2025000849	408000	PP	2020	C TABONY VETERINARY RELIEF	9/26/2025	Value	243,557	305,229	61,672		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,364.21	2,962.86	598.65		
						LL	0.00	359.19	359.19		
						INT	0.00	0.00	0.00		
						Tax TTL	2,364.21	3,322.05	957.84	0.00	
2025000755	408029	PP	2024	CALVARY EXPRESS INC	9/17/2025	Value	79,036	98,795	19,759		AUDIT
Public Notes:						Tax	509.23	636.54	127.31		
						LL	0.00	25.46	25.46		
						INT	0.00	0.00	0.00		
						Tax TTL	509.23	662.00	152.77	0.00	
2025000755	408029	PP	2023	CALVARY EXPRESS INC	9/17/2025	Value	85,833	107,291	21,458		AUDIT
Public Notes:						Tax	547.96	684.95	136.99		
						LL	0.00	41.10	41.10		
						INT	0.00	0.00	0.00		
						Tax TTL	547.96	726.05	178.09	0.00	
2025000755	408029	PP	2022	CALVARY EXPRESS INC	9/17/2025	Value	64,987	81,234	16,247		AUDIT
Public Notes:						Tax	414.88	518.60	103.72		
						LL	0.00	41.49	41.49		
						INT	0.00	0.00	0.00		
						Tax TTL	414.88	560.09	145.21	0.00	
2025000755	408029	PP	2021	CALVARY EXPRESS INC	9/17/2025	Value	86,026	107,533	21,507		AUDIT
Public Notes:						Tax	547.99	684.99	137.00		
						LL	0.00	68.50	68.50		
						INT	0.00	0.00	0.00		
						Tax TTL	547.99	753.49	205.50	0.00	

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2025000755	408029	PP	2020	CALVARY EXPRESS INC	9/17/2025	Value	56,181	70,226	14,045		AUDIT
Public Notes:						Tax	441.92	552.40	110.48		
						LL	0.00	66.29	66.29		
						INT	0.00	0.00	0.00		
						Tax TTL	441.92	618.69	176.77	0.00	
2025000360	408033	PP	2024	CAMELLIA GARDENS VENUE LLC	9/2/2025	Value	79,848	112,285	32,437		TMA AUDIT DISCOVERY
Public Notes:						Tax	513.58	722.22	208.64		
						LL	0.00	41.73	41.73		
						INT	0.00	0.00	0.00		
						Tax TTL	513.58	763.95	250.37	0.00	
2025000360	408033	PP	2023	CAMELLIA GARDENS VENUE LLC	9/2/2025	Value	90,375	130,205	39,830		TMA AUDIT DISCOVERY
Public Notes:						Tax	573.34	826.02	252.68		
						LL	0.00	75.80	75.80		
						INT	0.00	0.00	0.00		
						Tax TTL	573.34	901.82	328.48	0.00	
2025000360	408033	PP	2022	CAMELLIA GARDENS VENUE LLC	9/2/2025	Value	41,745	138,411	96,666		TMA AUDIT DISCOVERY
Public Notes:						Tax	264.83	878.08	613.25		
						LL	0.00	245.30	245.30		
						INT	0.00	0.00	0.00		
						Tax TTL	264.83	1,123.38	858.55	0.00	
2025000360	408033	PP	2021	CAMELLIA GARDENS VENUE LLC	9/2/2025	Value	42,025	138,656	96,631		TMA AUDIT DISCOVERY
Public Notes:						Tax	264.84	873.81	608.97		
						LL	26.48	330.97	304.49		
						INT	0.00	0.00	0.00		
						Tax TTL	291.32	1,204.78	913.46	0.00	
2025000360	408033	PP	2020	CAMELLIA GARDENS VENUE LLC	9/2/2025	Value	47,172	87,915	40,743		TMA AUDIT DISCOVERY
Public Notes:						Tax	363.79	678.00	314.21		
						LL	0.00	188.53	188.53		
						INT	0.00	0.00	0.00		
						Tax TTL	363.79	866.53	502.74	0.00	

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2025000816	408397	PP	2024	CHAMBERS EXPRESS TRUCKING	9/24/2025	Value	3,444,035	3,466,386	22,351		TMA AUDIT DISCOVERY
Public Notes:						Tax	28,819.68	29,006.72	187.04		
						LL	0.00	37.41	37.41		
						INT	0.00	0.00	0.00		
						Tax TTL	28,819.68	29,044.13	224.45	0.00	
2025000816	408397	PP	2023	CHAMBERS EXPRESS TRUCKING	9/24/2025	Value	2,611,537	2,634,436	22,899		TMA AUDIT DISCOVERY
Public Notes:						Tax	21,550.40	21,739.37	188.97		
						LL	2,155.04	2,211.82	56.78		
						INT	0.00	0.00	0.00		
						Tax TTL	23,705.44	23,951.19	245.75	0.00	
2025000816	408397	PP	2022	CHAMBERS EXPRESS TRUCKING	9/24/2025	Value	2,839,694	2,853,889	14,195		TMA AUDIT DISCOVERY
Public Notes:						Tax	22,924.85	23,039.45	114.60		
						LL	0.00	45.84	45.84		
						INT	0.00	0.00	0.00		
						Tax TTL	22,924.85	23,085.29	160.44	0.00	
2025000816	408397	PP	2021	CHAMBERS EXPRESS TRUCKING	9/24/2025	Value	2,485,739	2,499,573	13,834		TMA AUDIT DISCOVERY
Public Notes:						Tax	20,047.49	20,159.06	111.57		
						LL	0.00	55.79	55.79		
						INT	0.00	0.00	0.00		
						Tax TTL	20,047.49	20,214.85	167.36	0.00	
2025000816	408397	PP	2020	CHAMBERS EXPRESS TRUCKING	9/24/2025	Value	812,675	847,085	34,410		TMA AUDIT DISCOVERY
Public Notes:						Tax	7,874.82	8,208.25	333.43		
						LL	0.00	200.06	200.06		
						INT	0.00	0.00	0.00		
						Tax TTL	7,874.82	8,408.31	533.49	0.00	
2025000776	409110	PP	2025	DE LAGE LANDEN FINANCIAL S	9/18/2025	Value	10,354	11,372	1,018		CLERICAL ERROR
Public Notes:						Tax	79.75	87.59	7.84		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	79.75	87.59	7.84	0.00	

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2025000520	410024	PP	2024	FORMULA EURO LLC	9/11/2025	Value	40,815	51,019	10,204		TMA AUDIT DISCOVERY
Public Notes:						Tax	349.99	437.49	87.50		
						LL	35.00	52.50	17.50		
						INT	0.00	0.00	0.00		
						Tax TTL	384.99	489.99	105.00	0.00	
2025000520	410024	PP	2023	FORMULA EURO LLC	9/11/2025	Value	46,659	58,324	11,665		TMA AUDIT DISCOVERY
Public Notes:						Tax	383.44	479.31	95.87		
						LL	38.34	67.11	28.77		
						INT	0.00	0.00	0.00		
						Tax TTL	421.78	546.42	124.64	0.00	
2025000520	410024	PP	2022	FORMULA EURO LLC	9/11/2025	Value	56,705	70,881	14,176		TMA AUDIT DISCOVERY
Public Notes:						Tax	466.00	582.50	116.50		
						LL	46.60	93.20	46.60		
						INT	0.00	0.00	0.00		
						Tax TTL	512.60	675.70	163.10	0.00	
2025000520	410024	PP	2021	FORMULA EURO LLC	9/11/2025	Value	61,098	76,373	15,275		TMA AUDIT DISCOVERY
Public Notes:						Tax	501.74	627.18	125.44		
						LL	0.00	62.72	62.72		
						INT	0.00	0.00	0.00		
						Tax TTL	501.74	689.90	188.16	0.00	
2025000520	410024	PP	2020	FORMULA EURO LLC	9/11/2025	Value	71,757	89,696	17,939		TMA AUDIT DISCOVERY
Public Notes:						Tax	718.07	897.59	179.52		
						LL	71.81	179.52	107.71		
						INT	0.00	0.00	0.00		
						Tax TTL	789.88	1,077.11	287.23	0.00	
2025000366	411918	PP	2024	LUCAS LAWN & LANDSCAPE LLC	9/3/2025	Value	3,275,452	3,297,501	22,049		TMA AUDIT DISCOVERY
Public Notes:						Tax	21,477.14	21,621.71	144.57		
						LL	0.00	28.92	28.92		
						INT	0.00	0.00	0.00		
						Tax TTL	21,477.14	21,650.63	173.49	0.00	

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2025000366	411918	PP	2023	LUCAS LAWN & LANDSCAPE LLC	9/3/2025	Value	2,566,571	2,574,179	7,608		TMA AUDIT DISCOVERY
Public Notes:						Tax	16,667.31	16,716.72	49.41		
						LL	1,666.73	1,681.57	14.84		
						INT	0.00	0.00	0.00		
						Tax TTL	18,334.04	18,398.29	64.25	0.00	
2025000366	411918	PP	2022	LUCAS LAWN & LANDSCAPE LLC	9/3/2025	Value	1,849,783	2,292,537	442,754		TMA AUDIT DISCOVERY
Public Notes:						Tax	12,012.49	14,887.74	2,875.25		
						LL	0.00	1,150.10	1,150.10		
						INT	0.00	0.00	0.00		
						Tax TTL	12,012.49	16,037.84	4,025.35	0.00	
2025000367	411918	PP	2021	LUCAS LAWN & LANDSCAPE LLC	9/3/2025	Value	1,370,118	1,568,565	198,447		TMA AUDIT DISCOVERY
Public Notes:						Tax	11,263.74	12,895.17	1,631.43		
						LL	0.00	815.72	815.72		
						INT	0.00	0.00	0.00		
						Tax TTL	11,263.74	13,710.89	2,447.15	0.00	
2025000367	411918	PP	2020	LUCAS LAWN & LANDSCAPE LLC	9/3/2025	Value	924,982	968,569	43,587		TMA AUDIT DISCOVERY
Public Notes:						Tax	9,523.61	9,972.39	448.78		
						LL	0.00	269.26	269.26		
						INT	0.00	0.00	0.00		
						Tax TTL	9,523.61	10,241.65	718.04	0.00	
2025000851	413020	PP	2025	ONEONEONE INC	9/26/2025	Value	54,198	96,478	42,280		TMA AUDIT DISCOVERY
Public Notes:						Tax	417.43	743.07	325.64		
						LL	41.74	74.31	32.57		
						INT	0.00	0.00	0.00		
						Tax TTL	459.17	817.38	358.21	0.00	
2025000850	413020	PP	2024	ONEONEONE INC	9/26/2025	Value	54,198	110,458	56,260		TMA AUDIT DISCOVERY
Public Notes:						Tax	555.69	1,132.53	576.84		
						LL	55.57	170.94	115.37		
						INT	0.00	0.00	0.00		
						Tax TTL	611.26	1,303.47	692.21	0.00	

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2025000850	413020	PP	2023	ONEONEONE INC	9/26/2025	Value	54,198	116,063	61,865		TMA AUDIT DISCOVERY
Public Notes:						Tax	550.06	1,177.92	627.86		
						LL	55.01	243.37	188.36		
						INT	0.00	0.00	0.00		
						Tax TTL	605.07	1,421.29	816.22	0.00	
2025000850	413020	PP	2022	ONEONEONE INC	9/26/2025	Value	54,198	124,211	70,013		TMA AUDIT DISCOVERY
Public Notes:						Tax	550.06	1,260.62	710.56		
						LL	55.01	339.23	284.22		
						INT	0.00	0.00	0.00		
						Tax TTL	605.07	1,599.85	994.78	0.00	
2025000850	413020	PP	2021	ONEONEONE INC	9/26/2025	Value	63,447	129,437	65,990		TMA AUDIT DISCOVERY
Public Notes:						Tax	642.91	1,311.59	668.68		
						LL	64.29	334.34	270.05		
						INT	0.00	0.00	0.00		
						Tax TTL	707.20	1,645.93	938.73	0.00	
2025000850	413020	PP	2020	ONEONEONE INC	9/26/2025	Value	72,696	138,686	65,990		TMA AUDIT DISCOVERY
Public Notes:						Tax	849.45	1,620.55	771.10		
						LL	0.00	462.66	462.66		
						INT	0.00	0.00	0.00		
						Tax TTL	849.45	2,083.21	1,233.76	0.00	
2025000815	413375	PP	2025	CAROLINA PIZZA HUTS INC	9/24/2025	Value	116,120	190,799	74,679		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,015.12	1,667.96	652.84		
						LL	0.00	65.28	65.28		
						INT	0.00	0.00	0.00		
						Tax TTL	1,015.12	1,733.24	718.12	0.00	
2025000814	413375	PP	2024	CAROLINA PIZZA HUTS INC	9/24/2025	Value	114,282	193,854	79,572		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,246.25	2,113.98	867.73		
						LL	0.00	173.55	173.55		
						INT	0.00	0.00	0.00		
						Tax TTL	1,246.25	2,287.53	1,041.28	0.00	

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2025000814	413375	PP	2023	CAROLINA PIZZA HUTS INC	9/24/2025	Value	127,599	211,758	84,159		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,391.47	2,309.22	917.75		
						LL	0.00	275.33	275.33		
						INT	0.00	0.00	0.00		
						Tax TTL	1,391.47	2,584.55	1,193.08	0.00	
2025000798	414254	PP	2024	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	128,022	139,030	11,008		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,396.08	1,516.12	120.04		
						LL	0.00	24.01	24.01		
						INT	0.00	0.00	0.00		
						Tax TTL	1,396.08	1,540.13	144.05	0.00	
2025000797	414254	PP	2024	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	126,382	128,022	1,640		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,378.20	1,396.08	17.88		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,378.20	1,396.08	17.88	0.00	
2025000797	414254	PP	2023	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	143,681	145,321	1,640		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,566.84	1,584.73	17.89		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,566.84	1,584.73	17.89	0.00	
2025000798	414254	PP	2023	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	145,321	159,644	14,323		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,584.73	1,740.92	156.19		
						LL	0.00	46.86	46.86		
						INT	0.00	0.00	0.00		
						Tax TTL	1,584.73	1,787.78	203.05	0.00	
2025000798	414254	PP	2022	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	115,270	125,928	10,658		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,257.02	1,373.24	116.22		
						LL	0.00	46.49	46.49		
						INT	0.00	0.00	0.00		
						Tax TTL	1,257.02	1,419.73	162.71	0.00	

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2025000797	414254	PP	2022	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	113,630	115,270	1,640		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,239.14	1,257.02	17.88		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,239.14	1,257.02	17.88	0.00	
2025000797	414254	PP	2021	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	106,411	108,051	1,640		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,160.41	1,178.30	17.89		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,160.41	1,178.30	17.89	0.00	
2025000798	414254	PP	2021	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	108,051	133,685	25,634		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,178.30	1,457.83	279.53		
						LL	0.00	139.77	139.77		
						INT	0.00	0.00	0.00		
						Tax TTL	1,178.30	1,597.60	419.30	0.00	
2025000798	414254	PP	2020	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	57,011	66,147	9,136		TMA AUDIT DISCOVERY
Public Notes:						Tax	768.05	891.13	123.08		
						LL	0.00	73.85	73.85		
						INT	0.00	0.00	0.00		
						Tax TTL	768.05	964.98	196.93	0.00	
2025000797	414254	PP	2020	SCI NORTH CAROLINA FUNERAL	9/23/2025	Value	55,371	57,011	1,640		TMA AUDIT DISCOVERY
Public Notes:						Tax	745.96	768.05	22.09		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	745.96	768.05	22.09	0.00	
2025000361	414446	PP	2024	SIMPSON'S EGGS INC	9/3/2025	Value	11,271,702	16,799,108	5,527,406		TMA AUDIT DISCOVERY
Public Notes:						Tax	72,905.37	108,656.63	35,751.26		
						LL	0.00	7,150.25	7,150.25		
						INT	0.00	0.00	0.00		
						Tax TTL	72,905.37	115,806.88	42,901.51	0.00	

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2025000361	414446	PP	2022	SIMPSON'S EGGS INC	9/3/2025	Value	6,378,159	7,199,502	821,343		TMA AUDIT DISCOVERY
Public Notes:						Tax	39,952.79	45,097.68	5,144.89		
						LL	0.00	2,057.96	2,057.96		
						INT	0.00	0.00	0.00		
						Tax TTL	39,952.79	47,155.64	7,202.85	0.00	
2025000361	414446	PP	2021	SIMPSON'S EGGS INC	9/3/2025	Value	6,907,864	7,712,169	804,305		TMA AUDIT DISCOVERY
Public Notes:						Tax	43,353.75	48,401.57	5,047.82		
						LL	0.00	2,523.91	2,523.91		
						INT	0.00	0.00	0.00		
						Tax TTL	43,353.75	50,925.48	7,571.73	0.00	
2025000361	414446	PP	2020	SIMPSON'S EGGS INC	9/3/2025	Value	7,522,451	8,171,547	649,096		TMA AUDIT DISCOVERY
Public Notes:						Tax	59,261.87	64,375.45	5,113.58		
						LL	0.00	3,068.15	3,068.15		
						INT	0.00	0.00	0.00		
						Tax TTL	59,261.87	67,443.60	8,181.73	0.00	
2025000918	578868	PP	2025	ANCHOR CONSTRUCTION AND CO	9/30/2025	Value	603,512	711,164	107,652		TMA AUDIT DISCOVERY
Public Notes:						Tax	3,067.05	3,614.14	547.09		
						LL	306.71	361.43	54.72		
						INT	0.00	0.00	0.00		
						Tax TTL	3,373.76	3,975.57	601.81	0.00	
2025000917	578868	PP	2024	ANCHOR CONSTRUCTION AND CO	9/30/2025	Value	721,217	907,951	186,734		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,873.26	6,135.02	1,261.76		
						LL	487.33	739.69	252.36		
						INT	0.00	0.00	0.00		
						Tax TTL	5,360.59	6,874.71	1,514.12	0.00	
2025000917	578868	PP	2023	ANCHOR CONSTRUCTION AND CO	9/30/2025	Value	808,788	1,071,203	262,415		TMA AUDIT DISCOVERY
Public Notes:						Tax	5,414.03	7,170.63	1,756.60		
						LL	0.00	526.98	526.98		
						INT	0.00	0.00	0.00		
						Tax TTL	5,414.03	7,697.61	2,283.58	0.00	

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2025000917	578868	PP	2022	ANCHOR CONSTRUCTION AND CO	9/30/2025	Value	666,213	992,644	326,431		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,459.63	6,644.76	2,185.13		
						LL	445.96	1,320.02	874.06		
						INT	0.00	0.00	0.00		
						Tax TTL	4,905.59	7,964.78	3,059.19	0.00	
2025000917	578868	PP	2021	ANCHOR CONSTRUCTION AND CO	9/30/2025	Value	659,028	875,426	216,398		TMA AUDIT DISCOVERY
Public Notes:						Tax	4,412.85	5,861.85	1,449.00		
						LL	0.00	724.50	724.50		
						INT	0.00	0.00	0.00		
						Tax TTL	4,412.85	6,586.35	2,173.50	0.00	
2025000365	606123	PP	2024	CAROLINA CONSTRUCTION EQUI	9/3/2025	Value	370,254	2,599,053	2,228,799		TMA AUDIT DISCOVERY
Public Notes:						Tax	2,459.23	17,262.91	14,803.68		
						LL	245.92	3,206.65	2,960.73		
						INT	0.00	0.00	0.00		
						Tax TTL	2,705.15	20,469.56	17,764.41	0.00	
2025000365	606123	PP	2023	CAROLINA CONSTRUCTION EQUI	9/3/2025	Value	250,142	2,026,886	1,776,744		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,639.43	13,284.21	11,644.78		
						LL	163.94	3,657.28	3,493.34		
						INT	0.00	0.00	0.00		
						Tax TTL	1,803.37	16,941.49	15,138.12	0.00	
2025000365	606123	PP	2022	CAROLINA CONSTRUCTION EQUI	9/3/2025	Value	249,238	1,271,150	1,021,912		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,633.51	8,331.12	6,697.61		
						LL	163.35	2,842.35	2,679.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,796.86	11,173.47	9,376.61	0.00	
2025000365	606123	PP	2021	CAROLINA CONSTRUCTION EQUI	9/3/2025	Value	249,238	727,876	478,638		TMA AUDIT DISCOVERY
Public Notes:						Tax	1,623.04	4,739.93	3,116.89		
						LL	162.29	1,720.74	1,558.45		
						INT	0.00	0.00	0.00		
						Tax TTL	1,785.33	6,460.67	4,675.34	0.00	

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2025000365	606123	PP	2020	CAROLINA CONSTRUCTION EQUI	9/3/2025	Value	0	370,537	370,537		TMA AUDIT DISCOVERY
Public Notes:						Tax	0.00	2,950.22	2,950.22		
						LL	0.00	1,770.13	1,770.13		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4,720.35	4,720.35	0.00	
2025000587	621385	PP	2025	DLH EROSION CONTROL LLC	9/12/2025	Value	233,425	376,839	143,414		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	1,186.27	1,915.10	728.83		
						LL	118.63	191.52	72.89		
						INT	0.00	0.00	0.00		
						Tax TTL	1,304.90	2,106.62	801.72	0.00	
2025000824	640886	PP	2025	VRG COMPONENTS INC	9/25/2025	Value	0	36,074	36,074		TAX CODE CHANGE
Public Notes:						Tax	0.00	173.30	173.30		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	173.30	173.30	0.00	
2025000827	644791	PP	2025	MCATEER TOWING SERVICES LL	9/25/2025	Value	0	33,419	33,419		TAX CODE CHANGE
Public Notes:						Tax	0.00	292.15	292.15		
						LL	0.00	29.23	29.23		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	321.38	321.38	0.00	
2025000807	644961	PP	2025	RHOADS, DAPHNIE BEAR & RHOADS, JACOB KEITH	9/24/2025	Value	0	25,988	25,988		CLERICAL ERROR
Public Notes:						Tax	0.00	119.78	119.78		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	119.78	119.78	0.00	
2025000800	646085	PP	2025	CUTHBERTSON, GLENN DAVID	9/23/2025	Value	2,314	80,831	78,517		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	20.23	706.62	686.39		
						LL	0.00	68.64	68.64		
						INT	0.00	0.00	0.00		
						Tax TTL	20.23	775.26	755.03	0.00	

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2025000800	646085	PP	2024	CUTHBERTSON, GLENN DAVID	9/23/2025	Value	2,436	85,087	82,651		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	26.56	927.87	901.31		
						LL	0.00	180.26	180.26		
						INT	0.00	0.00	0.00		
						Tax TTL	26.56	1,108.13	1,081.57	0.00	
2025000767	646374	PP	2025	COOK, HOLLY VANDERBEEK	9/18/2025	Value	0	93,552	93,552		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	0.00	450.55	450.55		
						LL	0.00	45.06	45.06		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	495.61	495.61	0.00	
2025000581	646424	PP	2025	PAVAN PUTRA 2017 LLC	9/12/2025	Value	118,925	166,994	48,069		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	1,039.64	1,459.86	420.22		
						LL	103.96	0.00	(103.96)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,143.60	1,459.86	316.26	0.00	
2025000848	657567	PP	2025	BAKER, JOE EDWARD JR	9/26/2025	Value	0	48,640	48,640		TAX CODE CHANGE
Public Notes:						Tax	0.00	237.02	237.02		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	237.02	237.02	0.00	
2025000786	661904	PP	2024	BROADWAY, EBETH B	9/19/2025	Value	0	5,241	5,241		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	34.37	34.37		
						LL	0.00	6.87	6.87		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	41.24	41.24	0.00	
2025000799	662752	PP	2025	KST FAMILY PROPERTIES LLC	9/23/2025	Value	47,250	84,335	37,085		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	236.06	421.34	185.28		
						LL	23.61	42.14	18.53		
						INT	0.00	0.00	0.00		
						Tax TTL	259.67	463.48	203.81	0.00	

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2025000735	663980	PP	2024	BROWN, DARIUS RHASHIN	9/16/2025	Value	0	27,767	27,767		TAX CODE CHANGE
Public Notes:						Tax	0.00	177.79	177.79		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	177.79	177.79	0.00	
2025000804	664938	PP	2025	BERGENTY, RYAN ANTHONY	9/23/2025	Value	0	7,738	7,738		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	39.52	39.52		
						LL	0.00	3.95	3.95		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	43.47	43.47	0.00	
2025000600	664964	PP	2024		9/12/2025	Value	0	8,223	8,223		GAP BILL
Public Notes:						Tax	0.00	99.63	99.63		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	99.63	99.63	0.00	
2025000599	664970	PP	2024		9/12/2025	Value	0	1,950	1,950		GAP BILL
Public Notes:						Tax	0.00	12.61	12.61		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	12.61	12.61	0.00	
2025000598	664971	PP	2024		9/12/2025	Value	0	1,130	1,130		GAP BILL
Public Notes:						Tax	0.00	7.55	7.55		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	7.55	7.55	0.00	
2025000597	664975	PP	2024		9/12/2025	Value	0	4,113	4,113		GAP BILL
Public Notes:						Tax	0.00	49.83	49.83		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	49.83	49.83	0.00	

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2025000784	664983	PP	2025	BIRMINGHAM, JACOB DANIEL	9/19/2025	Value	0	30,517	30,517		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	148.71	148.71		
						LL	0.00	14.87	14.87		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	163.58	163.58	0.00	
2025000784	664983	PP	2024	BIRMINGHAM, JACOB DANIEL	9/19/2025	Value	0	32,126	32,126		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	210.04	210.04		
						LL	0.00	42.01	42.01		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	252.05	252.05	0.00	
2025000784	664983	PP	2023	BIRMINGHAM, JACOB DANIEL	9/19/2025	Value	0	33,817	33,817		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	217.31	217.31		
						LL	0.00	65.19	65.19		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	282.50	282.50	0.00	
2025000802	664984	PP	2025	LUENGAS-HERNANDEZ, CANDY M	9/23/2025	Value	0	2,700	2,700		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	20.41	20.41		
						LL	0.00	2.04	2.04		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	22.45	22.45	0.00	
2025000616	664996	PP	2025	CARTER, MICHAEL SHANE	9/12/2025	Value	0	3,795	3,795		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	18.17	18.17		
						LL	0.00	1.82	1.82		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	19.99	19.99	0.00	
2025000616	664996	PP	2024	CARTER, MICHAEL SHANE	9/12/2025	Value	0	4,161	4,161		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	26.56	26.56		
						LL	0.00	5.31	5.31		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	31.87	31.87	0.00	

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2025000615	665010	PP	2025		9/12/2025	Value	0	13,989	13,989		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	66.90	66.90		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	66.90	66.90	0.00	
2025000613	665021	PP	2024		9/12/2025	Value	0	18,363	18,363		GAP BILL
Public Notes:						Tax	0.00	117.38	117.38		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	117.38	117.38	0.00	
2025000612	665022	PP	2024		9/12/2025	Value	0	13,032	13,032		GAP BILL
Public Notes:						Tax	0.00	157.90	157.90		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	157.90	157.90	0.00	
2025000611	665023	PP	2024		9/12/2025	Value	0	23,838	23,838		GAP BILL
Public Notes:						Tax	0.00	155.61	155.61		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	155.61	155.61	0.00	
2025000609	665024	PP	2024		9/12/2025	Value	0	2,147	2,147		GAP BILL
Public Notes:						Tax	0.00	17.97	17.97		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	17.97	17.97	0.00	
2025000590	666181	PP	2025	DIXON, MICHAEL ANTONIO	9/12/2025	Value	0	36,000	36,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	314.71	314.71		
						LL	0.00	31.47	31.47		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	346.18	346.18	0.00	

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2025000589	669020	PP	2025	HINSON, ROLAND LANE	9/12/2025	Value	0	3,458	3,458		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	17.57	17.57		
						LL	0.00	1.76	1.76		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	19.33	19.33	0.00	
2025000725	669027	PP	2025	GRIFFIN, WRISTON LEE	9/16/2025	Value	0	2,173	2,173		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	11.10	11.10		
						LL	0.00	1.11	1.11		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	12.21	12.21	0.00	
2025000803	669039	PP	2025	COOPER, MICHAEL CHARLES	9/23/2025	Value	0	28,344	28,344		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	138.06	138.06		
						LL	0.00	13.81	13.81		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	151.87	151.87	0.00	
2025000785	669048	PP	2025	HAMMER TIME ENTERPRISES IN	9/19/2025	Value	0	1,466	1,466		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	12.82	12.82		
						LL	0.00	1.28	1.28		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	14.10	14.10	0.00	
2025000845	669084	PP	2024		9/26/2025	Value	0	8,525	8,525		GAP BILL
Public Notes:						Tax	0.00	55.65	55.65		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	55.65	55.65	0.00	
2025000653	669139	PP	2025	GRIFFIN, RHONDA LYNN & GRIFFIN, CHARLES MITCHE	9/15/2025	Value	0	15,252	15,252		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	70.30	70.30		
						LL	0.00	7.03	7.03		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	77.33	77.33	0.00	

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2025000588	669186	PP	2025		9/12/2025	Value	0	4,061	4,061		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						Tax	0.00	19.42	19.42		
						LL	0.00	1.94	1.94		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	21.36	21.36	0.00	
Totals for Type Value Change - Discovery :						Value	77,017,416	107,472,980	30,455,564		
						Tax	573,956.39	822,062.39	248,106.00		
						LL	8,456.06	60,025.72	51,569.66		
						INT	0.00	0.00	0.00		
						Tax TTL	582,412.45	882,088.11	299,675.66	0.00	

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2025000889	01204065	RE	2025	FANGMAN, HEATHER E & FANGMAN, BRIAN E	9/29/2025	Value	451,300	284,400	(166,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,281.32	1,437.64	(843.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,281.32	1,437.64	(843.68)	0.00	
2025000489	01210011A	RE	2025	ROGERS, TRUTH S J	9/10/2025	Value	139,300	58,900	(80,400)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	704.16	297.74	(406.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	704.16	297.74	(406.42)	0.00	

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2025000489	01210011A	RE	2024	ROGERS, TRUTH S J	9/10/2025	Value	91,700	26,200	(65,500)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	593.12	169.46	(423.66)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	593.12	169.46	(423.66)	0.00	
2025000489	01210011A	RE	2023	ROGERS, TRUTH S J	9/10/2025	Value	91,700	26,200	(65,500)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	574.41	164.12	(410.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	574.41	164.12	(410.29)	0.00	
2025000489	01210011A	RE	2022	ROGERS, TRUTH S J	9/10/2025	Value	91,700	26,200	(65,500)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	574.41	164.12	(410.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	574.41	164.12	(410.29)	410.29	
2025000489	01210011A	RE	2021	ROGERS, TRUTH S J	9/10/2025	Value	91,700	26,200	(65,500)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	575.51	164.43	(411.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	575.51	164.43	(411.08)	411.08	
2025000697	02009002	RE	2025	HORNE, AMANDA D & HORNE, DUSTIN J	9/15/2025	Value	428,900	368,400	(60,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,149.64	1,846.42	(303.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,149.64	1,846.42	(303.22)	0.00	
2025000892	02021002	RE	2025	UEBELE, JENNIFER M & UEBELE, TIMOTHY R	9/29/2025	Value	239,700	187,800	(51,900)		CHANGE VALUE PER BER
Public Notes:						Tax	1,201.38	941.25	(260.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,201.38	941.25	(260.13)	0.00	

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2025000461	02145016	RE	2025	MADDOX, HEATHER PRICE ET A & STEGALL, HENNIFER HELMS	9/8/2025	Value	66,300	64,200	(2,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	332.30	321.77	(10.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	332.30	321.77	(10.53)	0.00	
2025000640	02199005B	RE	2025	HODGE, DEREK L & HODGE, KAREN F	9/15/2025	Value	28,200	3,600	(24,600)		CHANGE VALUE PER BER
Public Notes:						Tax	142.55	18.20	(124.35)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	142.55	18.20	(124.35)	0.00	
2025000871	02301062	RE	2025	PALOMA REALTY LLC	9/29/2025	Value	343,800	42,500	(301,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,338.99	412.76	(2,926.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,338.99	412.76	(2,926.23)	0.00	
2025000752	02310087	RE	2025	WOODS, PATRICIA J & WOODS, PHILLIP A	9/17/2025	Value	308,900	276,500	(32,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,000.04	2,685.37	(314.67)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,000.04	2,685.37	(314.67)	0.00	
2025000873	03006007A	RE	2025	SCOPOULIS, STEFAN & SCOPOULIS, NADINE C M	9/29/2025	Value	378,000	220,500	(157,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,885.46	1,099.85	(785.61)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,885.46	1,099.85	(785.61)	0.00	
2025000742	03108021	RE	2025	THAD4 INC	9/17/2025	Value	694,200	611,600	(82,600)		CHANGE VALUE PER BER
Public Notes:						Tax	3,382.84	2,980.33	(402.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,382.84	2,980.33	(402.51)	0.00	

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2025000743	03108021A	RE	2025	THAD4 INC	9/17/2025	Value	549,300	533,100	(16,200)		CHANGE VALUE PER BER
Public Notes:						Tax	2,676.74	2,597.80	(78.94)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,676.74	2,597.80	(78.94)	0.00	
2025000744	03108021C	RE	2025	THAD4 INC	9/17/2025	Value	945,300	538,000	(407,300)		CHANGE VALUE PER BER
Public Notes:						Tax	4,606.45	2,621.67	(1,984.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,606.45	2,621.67	(1,984.78)	0.00	
2025000870	03126027	RE	2025	SMITH, MICHAEL ALLAN	9/29/2025	Value	170,300	97,100	(73,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	829.87	473.17	(356.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	829.87	473.17	(356.70)	0.00	
2025000891	03138031	RE	2025	JORDAN, SYBIL A	9/29/2025	Value	360,000	359,300	(700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,754.28	1,750.87	(3.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,754.28	1,750.87	(3.41)	0.00	
2025000904	04033015	RE	2025	COX, FRED RUSSELL & COX, CAMPBELL FRED	9/29/2025	Value	180,600	62,800	(117,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	863.63	300.31	(563.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	863.63	300.31	(563.32)	563.32	
2025000910	04060007	RE	2025	WHITLEY, JUDITH	9/30/2025	Value	303,483	184,183	(119,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,451.25	880.76	(570.49)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,451.25	880.76	(570.49)	570.49	

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2025000908	04078001B	RE	2025	PLYLER, BRADLEY JAMES	9/29/2025	Value	24,200	13,400	(10,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	117.93	65.30	(52.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	117.93	65.30	(52.63)	52.63	
2025000915	04198004L	RE	2025	TEFF, MICHAEL R	9/30/2025	Value	47,900	18,400	(29,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	216.27	83.08	(133.19)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	216.27	83.08	(133.19)	0.00	
2025000577	04201002B	RE	2025	GRIFFIN, CHARLES MITCHELL & GRIFFIN, RHONDA L	9/11/2025	Value	85,000	81,400	(3,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	391.77	375.17	(16.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	391.77	375.17	(16.60)	0.00	
2025000578	04201002C	RE	2025	GRIFFIN, CHARLES MITCHELL & GRIFFIN, RHONDA L	9/11/2025	Value	31,700	12,400	(19,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	146.11	57.15	(88.96)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	146.11	57.15	(88.96)	0.00	
2025000667	04347020	RE	2025	TSURKANU, OKTAVIAN & TSURKANU, ANNA	9/15/2025	Value	559,800	516,100	(43,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,680.32	2,471.09	(209.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,680.32	2,471.09	(209.23)	0.00	
2025000601	05005005C	RE	2025	WHITEHAIR, ANNE M & WHITEHAIR, CHESLEY W	9/12/2025	Value	79,000	68,500	(10,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	380.46	329.90	(50.56)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	380.46	329.90	(50.56)	0.00	

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2025000748	05045017B	RE	2025	NORWOOD, HAZEL O & NORWOOD, GLORIA T	9/17/2025	Value	420,400	399,000	(21,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,012.88	1,910.41	(102.47)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,012.88	1,910.41	(102.47)	0.00	
2025000931	05048012F	RE	2025	POSNER, VADIM A & POSNER, POLINA M	9/30/2025	Value	1,045,000	903,200	(141,800)		CHANGE VALUE PER BER
Public Notes:						Tax	5,003.46	4,324.52	(678.94)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,003.46	4,324.52	(678.94)	0.00	
2025000770	05078002D	RE	2025	LACOY, MICHELLE ANN ET AL & RODRIGUEZ, ROBERTO WALL	9/18/2025	Value	211,800	198,500	(13,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,014.10	950.42	(63.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,014.10	950.42	(63.68)	0.00	
2025000602	05084002E	RE	2025	MORRILL, JOHN BRUCE JR & MORRILL, JENNIFER L	9/12/2025	Value	221,800	217,200	(4,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,103.90	1,081.00	(22.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,103.90	1,081.00	(22.90)	0.00	
2025000641	05084035	RE	2025	HAYES, JOHN R JR & HAYES, MARY L	9/15/2025	Value	300,900	208,200	(92,700)		CHANGE VALUE PER BER
Public Notes:						Tax	1,497.58	1,036.21	(461.37)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,497.58	1,036.21	(461.37)	0.00	
2025000553	05084037	RE	2025	BROOKS, DAVID E & BROOKS, PATRICIA H	9/11/2025	Value	303,500	251,200	(52,300)		CHANGE VALUE PER BER
Public Notes:						Tax	1,510.52	1,250.22	(260.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,510.52	1,250.22	(260.30)	0.00	

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2025000450	05099006	RE	2025	MORGAN, KIRBY T	9/8/2025	Value	529,900	498,200	(31,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,537.16	2,385.38	(151.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,537.16	2,385.38	(151.78)	0.00	
2025000750	05099031	RE	2025	DOLLHOFF, DIANA M	9/17/2025	Value	452,100	421,700	(30,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,164.65	2,019.10	(145.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,164.65	2,019.10	(145.55)	0.00	
2025000668	05112021	RE	2025	WAXHAW LODGE #250	9/15/2025	Value	69,200	0	(69,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	532.97	0.00	(532.97)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	532.97	0.00	(532.97)	0.00	
2025000447	05112064A	RE	2025	BAF ASSETS 5 LLC	9/8/2025	Value	388,100	351,200	(36,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,989.15	2,704.94	(284.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,989.15	2,704.94	(284.21)	0.00	
2025000899	05132011B	RE	2025	MAYO, JUDY ZECCHIN TRUSTEE	9/29/2025	Value	475,400	379,400	(96,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,276.22	1,816.57	(459.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,276.22	1,816.57	(459.65)	0.00	
2025000901	05132012A	RE	2025	MAYO, JUDY Z	9/29/2025	Value	1,002,000	955,800	(46,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,797.58	4,576.37	(221.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,797.58	4,576.37	(221.21)	0.00	

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2025000666	05147066	RE	2025	BRAUDA, KATHERINE H & BRAUDA, JEREMY A	9/15/2025	Value	824,900	768,000	(56,900)		CHANGE VALUE PER BER
Public Notes:						Tax	3,961.17	3,687.94	(273.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,961.17	3,687.94	(273.23)	0.00	
2025000548	05156047	RE	2025	SAKAMOTO, WESLEY K JR & SAKAMOTO, KELSEY S	9/11/2025	Value	397,600	352,000	(45,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,909.28	1,690.30	(218.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,909.28	1,690.30	(218.98)	0.00	
2025000897	05165506	RE	2025	QUIGLEY, ARIANA & SCATA, J TYLER	9/29/2025	Value	652,500	593,200	(59,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,025.56	4,568.83	(456.73)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,025.56	4,568.83	(456.73)	0.00	
2025000556	05168098	RE	2025	HENDRICKSON, GINA R	9/11/2025	Value	569,700	564,000	(5,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,387.83	4,343.93	(43.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,387.83	4,343.93	(43.90)	0.00	
2025000552	05177001	RE	2025	GOLDEN SCORE RANCH LLC	9/11/2025	Value	353,400	340,200	(13,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,697.03	1,633.64	(63.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,697.03	1,633.64	(63.39)	63.39	
2025000902	05186001F	RE	2025	LECH, ELIZABETH P & LECH, ROBERT	9/29/2025	Value	1,893,200	1,749,700	(143,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,091.15	8,402.06	(689.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,091.15	8,402.06	(689.09)	0.00	

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2025000458	06003003	RE	2025	HAFEY, SHIRLEY S	9/8/2025	Value	1,109,600	950,000	(159,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,404.86	4,627.45	(777.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,404.86	4,627.45	(777.41)	0.00	
2025000452	06003004G	RE	2025	DUPUIS, MARGARET J & DUPUIS, JOSHUA A	9/8/2025	Value	636,800	595,000	(41,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,224.12	3,012.49	(211.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,224.12	3,012.49	(211.63)	0.00	
2025000657	06003006B	RE	2025	UNDERWOOD, JONATHAN & UNDERWOOD, ANNA DAWN SM	9/15/2025	Value	646,300	582,000	(64,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,148.13	2,834.92	(313.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,148.13	2,834.92	(313.21)	0.00	
2025000895	06003018	RE	2025	PARKER, BRIAN KEITH & PARKER, LISA C	9/29/2025	Value	484,000	412,800	(71,200)		CHANGE VALUE PER BER
Public Notes:						Tax	2,357.56	2,010.75	(346.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,357.56	2,010.75	(346.81)	0.00	
2025000780	06009016	RE	2025	PENEGAR, JANICE GWYNN	9/18/2025	Value	1,060,200	1,021,000	(39,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,105.92	4,917.14	(188.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,105.92	4,917.14	(188.78)	0.00	
2025000566	06024041	RE	2025	VMD INC	9/11/2025	Value	439,900	340,000	(99,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,142.75	1,656.14	(486.61)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,142.75	1,656.14	(486.61)	0.00	

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2025000607	06027493	RE	2025	ROSEMAN, JULIE ANN & ROSEMAN, DAVID J	9/12/2025	Value	645,200	541,800	(103,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,997.60	2,517.20	(480.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,997.60	2,517.20	(480.40)	0.00	
2025000405	06030003C	RE	2025	BHAVE, RAJEEV D & BHAVE, SONIA RAI	9/5/2025	Value	901,900	480,000	(421,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,343.55	2,311.68	(2,031.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,343.55	2,311.68	(2,031.87)	0.00	
2025000844	06033028	RE	2025	KATZ, PETER	9/25/2025	Value	667,900	601,100	(66,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,216.61	2,894.90	(321.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,216.61	2,894.90	(321.71)	0.00	
2025000658	06042004B	RE	2025	VON ASPERN, ERIC	9/15/2025	Value	607,300	553,800	(53,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,034.07	2,766.78	(267.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,034.07	2,766.78	(267.29)	0.00	
2025000643	06042025B	RE	2025	TATE, KATHLEEN M & TATE, SCOTT V	9/15/2025	Value	510,900	431,100	(79,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,373.64	2,002.89	(370.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,373.64	2,002.89	(370.75)	0.00	
2025000555	06042234	RE	2025	COLEMAN, LAURA & COLEMAN, KURT	9/11/2025	Value	3,787,900	3,160,600	(627,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	17,598.58	14,684.15	(2,914.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	17,598.58	14,684.15	(2,914.43)	0.00	

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2025000885	06042241	RE	2025	MERSCH, ROBERT CHARLES & MERSCH, ANGELA ROSS	9/29/2025	Value	2,857,300	2,476,400	(380,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	13,275.02	11,505.35	(1,769.67)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	13,275.02	11,505.35	(1,769.67)	0.00	
2025000832	06045005C	RE	2025	SAIN, GENE B & SAIN, CATHERINE	9/25/2025	Value	961,300	789,700	(171,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,682.49	3,846.63	(835.86)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,682.49	3,846.63	(835.86)	0.00	
2025000857	06045005K	RE	2025	SAIN, CHERYL L	9/29/2025	Value	770,300	656,000	(114,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,752.13	3,195.38	(556.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,752.13	3,195.38	(556.75)	0.00	
2025000659	06045006	RE	2025	FREITAG, ROBERT W & FREITAG, PAMELA E	9/15/2025	Value	393,700	364,400	(29,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,917.71	1,774.99	(142.72)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,917.71	1,774.99	(142.72)	0.00	
2025000487	06048157	RE	2025	JOHNSTON, BRIELLE FERREIRA & JOHNSTON, HOWARD MAXWEL	9/9/2025	Value	715,700	695,800	(19,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,486.17	3,389.24	(96.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,486.17	3,389.24	(96.93)	0.00	
2025000745	06051004C	RE	2025	SAXON, DONALD & SAXON, DEBORAH E	9/17/2025	Value	328,900	283,200	(45,700)		CHANGE VALUE PER BER
Public Notes:						Tax	1,583.98	1,363.89	(220.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,583.98	1,363.89	(220.09)	0.00	

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2025000462	06054047B	RE	2025	BIBB, LINDA & HOLLAR, RICHARD ALLEN	9/8/2025	Value	326,100	307,900	(18,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,627.57	1,536.73	(90.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,627.57	1,536.73	(90.84)	0.00	
2025000464	06054049A	RE	2025	SAVONA, FRANK & SAVONA, MARGARET	9/9/2025	Value	844,700	788,700	(56,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,068.08	3,798.38	(269.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,068.08	3,798.38	(269.70)	0.00	
2025000905	06060010	RE	2025	HELMS, NANCY N & EDWARDS, FREIDA N	9/29/2025	Value	120,100	62,200	(57,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	599.42	310.44	(288.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	599.42	310.44	(288.98)	0.00	
2025000550	06063008	RE	2025	MCPHATTER, VICTORIA & MCPHATTER, FREDRICK NOE	9/11/2025	Value	771,600	690,800	(80,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,854.91	3,451.24	(403.67)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,854.91	3,451.24	(403.67)	0.00	
2025000417	06063019	RE	2024	MONTGOMERY, BILL & MONTGOMERY, ROBERT TERR	9/5/2025	Value	481,100	454,000	(27,100)		SQUARE FOOTAGE
Public Notes:						Tax	3,140.62	2,963.71	(176.91)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,140.62	2,963.71	(176.91)	170.14	
2025000417	06063019	RE	2023	MONTGOMERY, BILL & MONTGOMERY, ROBERT TERR	9/5/2025	Value	481,100	454,000	(27,100)		SQUARE FOOTAGE
Public Notes:						Tax	3,045.36	2,873.82	(171.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,045.36	2,873.82	(171.54)	159.35	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000417	06063019	RE	2022	MONTGOMERY, BILL & MONTGOMERY, ROBERT TERR	9/5/2025	Value	481,100	454,000	(27,100)		SQUARE FOOTAGE
Public Notes:						Tax	3,059.80	2,887.44	(172.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,059.80	2,887.44	(172.36)	159.35	
2025000417	06063019	RE	2021	MONTGOMERY, BILL & MONTGOMERY, ROBERT TERR	9/5/2025	Value	481,100	454,000	(27,100)		SQUARE FOOTAGE
Public Notes:						Tax	3,059.80	2,887.44	(172.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,059.80	2,887.44	(172.36)	159.35	
2025000417	06063019	RE	2020	MONTGOMERY, BILL & MONTGOMERY, ROBERT TERR	9/5/2025	Value	362,900	339,000	(23,900)		SQUARE FOOTAGE
Public Notes:						Tax	2,841.14	2,654.03	(187.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,841.14	2,654.03	(187.11)	174.68	
2025000833	06063104	RE	2025	HARDY, GAIL S	9/25/2025	Value	692,600	576,300	(116,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,460.23	2,879.19	(581.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,460.23	2,879.19	(581.04)	0.00	
2025000549	06066103	RE	2025	SERAFIN, DOUGLAS SCOTT	9/11/2025	Value	936,500	898,500	(38,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,678.75	4,488.91	(189.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,678.75	4,488.91	(189.84)	0.00	
2025000879	06066192	RE	2025	NATURE'S CALLING LLC	9/29/2025	Value	293,400	175,000	(118,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,465.83	874.30	(591.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,465.83	874.30	(591.53)	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000877	06069003H	RE	2025	LOCHARY, MARGARET E & MEADE, JOHN B	9/29/2025	Value	934,200	739,600	(194,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,340.29	3,436.18	(904.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,340.29	3,436.18	(904.11)	0.00	
2025000485	06069005D	RE	2025	THOMAS, JONATHAN R	9/9/2025	Value	1,456,400	1,169,300	(287,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,766.43	5,432.57	(1,333.86)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,766.43	5,432.57	(1,333.86)	0.00	
2025000484	06069005E	RE	2025	THOMAS, ROBERT JOHN & THOMAS, MARY INNIS	9/9/2025	Value	1,635,900	1,375,900	(260,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,600.39	6,392.43	(1,207.96)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,600.39	6,392.43	(1,207.96)	0.00	
2025000547	06069121	RE	2025	MONFORT, DAVID & MONFORT, MARY	9/11/2025	Value	757,700	708,100	(49,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,785.47	3,537.67	(247.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,785.47	3,537.67	(247.80)	0.00	
2025000546	06069125	RE	2025	DISOGRA, KRISTYN YEMM & DISOGRA, MATTHEW CHARLE	9/11/2025	Value	877,200	790,800	(86,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,382.49	3,950.84	(431.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,382.49	3,950.84	(431.65)	0.00	
2025000886	06069151	RE	2025	SULLIVAN, KEVIN J & SULLIVAN, NANCY A	9/29/2025	Value	697,900	638,800	(59,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,486.71	3,191.44	(295.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,486.71	3,191.44	(295.27)	0.00	

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2025000655	06069239	RE	2025	DOUGHERTY, CRAIG & DOUGHERTY, GAIL G	9/15/2025	Value	729,500	693,500	(36,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,644.58	3,464.73	(179.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,644.58	3,464.73	(179.85)	0.00	
2025000880	06072024	RE	2025	LUDWIG, ELIZABETH & LUDWIG, ERIC	9/29/2025	Value	949,600	829,800	(119,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,625.50	4,041.96	(583.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,625.50	4,041.96	(583.54)	0.00	
2025000544	06072048	RE	2025	MARKOVIC, VESNA & MARKOVIC, BOJAN	9/11/2025	Value	730,800	676,600	(54,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,651.08	3,380.29	(270.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,651.08	3,380.29	(270.79)	0.00	
2025000424	06072272	RE	2025	FENN, KEITH E TRUSTEE & ARENAS-FENN, MARTHA A T	9/5/2025	Value	968,700	863,100	(105,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,500.58	4,009.96	(490.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,500.58	4,009.96	(490.62)	0.00	
2025000639	06075058	RE	2025	HICKEY, BRIAN	9/15/2025	Value	1,166,100	1,125,900	(40,200)		CHANGE VALUE PER BER
Public Notes:						Tax	5,680.07	5,484.26	(195.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,680.07	5,484.26	(195.81)	0.00	
2025000654	06096031	RE	2025	SHAFFER, STEPHEN P & SHAFFER, STARR B	9/15/2025	Value	356,900	276,100	(80,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,783.07	1,379.40	(403.67)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,783.07	1,379.40	(403.67)	0.00	

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2025000427	06096033A	RE	2025	ROGERS, AMANDA PERRY & ROGERS, MARK BRAXTON	9/5/2025	Value	866,400	816,000	(50,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,328.53	4,076.74	(251.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,328.53	4,076.74	(251.79)	0.00	
2025000518	06096202	RE	2025	ROWLAND, CHERYL H & ROWLAND, DONNIE L	9/11/2025	Value	1,045,300	889,700	(155,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,222.32	4,444.94	(777.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,222.32	4,444.94	(777.38)	0.00	
2025000519	06096220	RE	2025	CLYMER, CADRIA SHAMILEVNA & MIKRYUKOV, VYACHESLAV V	9/11/2025	Value	1,461,200	1,321,000	(140,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,300.16	6,599.72	(700.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,300.16	6,599.72	(700.44)	0.00	
2025000468	06099102	RE	2025	SUTTON, REGINALD L & SUTTON, AMY ELIZABETH	9/9/2025	Value	856,500	838,900	(17,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,279.07	4,191.14	(87.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,279.07	4,191.14	(87.93)	0.00	
2025000404	06099192	RE	2025	PHLIPOT, JOHN D & PHLIPOT, SARAH R	9/5/2025	Value	1,252,300	913,800	(338,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,256.49	4,565.34	(1,691.15)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,256.49	4,565.34	(1,691.15)	0.00	
2025000835	06099438	RE	2025	SUNDARARAJ, JULIET & THIRUMANIVASAGAM, ANAND	9/25/2025	Value	1,070,900	1,035,200	(35,700)		CHANGE VALUE PER BER
Public Notes:						Tax	5,350.22	5,171.86	(178.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,350.22	5,171.86	(178.36)	0.00	

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2025000860	06102001B	RE	2025	PERRY, FRED S	9/29/2025	Value	842,500	780,300	(62,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,914.26	3,625.27	(288.99)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,914.26	3,625.27	(288.99)	0.00	
2025000403	06102142	RE	2025	GIULIANI, JAMIE L & GIULIANI, ADRIAN	9/5/2025	Value	2,862,100	2,095,700	(766,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	13,297.32	9,736.62	(3,560.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	13,297.32	9,736.62	(3,560.70)	0.00	
2025000686	06102213	RE	2025	MUCCI, LORIEN K & MUCCI, GIULIO J	9/15/2025	Value	1,991,200	1,792,100	(199,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,251.12	8,326.10	(925.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,251.12	8,326.10	(925.02)	0.00	
2025000656	06102229	RE	2025	POLZIEN, DEREK & POLZIEN, LIA	9/15/2025	Value	1,617,800	1,534,400	(83,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,516.30	7,128.82	(387.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,516.30	7,128.82	(387.48)	0.00	
2025000430	06102237	RE	2025	STRAIN, AMANDA M & STRAIN, JEFFREY M	9/5/2025	Value	2,289,400	2,084,000	(205,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	10,636.55	9,682.26	(954.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,636.55	9,682.26	(954.29)	0.00	
2025000409	06102283	RE	2025	DOYLE, BRITTANY G & DOYLE, BRIAN JAMES	9/5/2025	Value	1,920,800	1,779,000	(141,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,924.04	8,265.23	(658.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,924.04	8,265.23	(658.81)	0.00	

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2025000652	06102310	RE	2025	PAPPAS, MIKE G TRUSTEE ET & PAPPAS MIKE G AND VOULA	9/15/2025	Value	1,926,200	1,882,900	(43,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,949.13	8,747.95	(201.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,949.13	8,747.95	(201.18)	0.00	
2025000465	06105014N	RE	2025	REULE, SANDRA BAXTER & REULE, WILLIAM H JR	9/9/2025	Value	1,399,600	1,267,800	(131,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,817.45	6,175.45	(642.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,817.45	6,175.45	(642.00)	0.00	
2025000843	06105182	RE	2025	SPANGLER, HOLLY D & SPANGLER, SCOTT L	9/25/2025	Value	647,600	643,700	(3,900)		CHANGE VALUE PER BER
Public Notes:						Tax	3,154.46	3,135.46	(19.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,154.46	3,135.46	(19.00)	19.00	
2025000772	06111047	RE	2025	JONES, PATRICIA ANN	9/18/2025	Value	937,700	815,300	(122,400)		CHANGE VALUE PER BER
Public Notes:						Tax	4,502.84	3,915.07	(587.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,502.84	3,915.07	(587.77)	0.00	
2025000861	06117054	RE	2025	LEDFORD, TRACY & HAUGHWOUT, PAUL C	9/29/2025	Value	831,400	526,500	(304,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,153.67	2,630.39	(1,523.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,153.67	2,630.39	(1,523.28)	0.00	
2025000644	06117069	RE	2025	COLBERT, GERALD K & COLBERT, TOBI W	9/15/2025	Value	92,200	80,500	(11,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	428.36	374.00	(54.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	428.36	374.00	(54.36)	0.00	

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2025000567	06117276	RE	2025	FISHER, JANICE U & FISHER, LEWIS R	9/11/2025	Value	1,377,900	1,250,700	(127,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,883.99	6,248.50	(635.49)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,883.99	6,248.50	(635.49)	0.00	
2025000554	06120034	RE	2025	MUSSEN, KYLE BRADLEY & MUSSEN, KEVIN RILEY	9/11/2025	Value	214,800	128,900	(85,900)		CHANGE VALUE PER BER
Public Notes:						Tax	1,073.14	643.98	(429.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,073.14	643.98	(429.16)	0.00	
2025000413	06120044	RE	2025	SPENCE, SHIRLEY MAXWELL	9/5/2025	Value	936,000	831,600	(104,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,676.26	4,154.67	(521.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,676.26	4,154.67	(521.59)	0.00	
2025000571	06123032	RE	2025	LANDON, HEATHER & LANDON, BRIAN	9/11/2025	Value	1,752,700	1,472,300	(280,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,756.49	7,355.61	(1,400.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,756.49	7,355.61	(1,400.88)	0.00	
2025000528	06123045	RE	2025	MCDOWALL, HARRIET S & MCDOWALL, ROBERT D	9/11/2025	Value	821,700	795,800	(25,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,105.21	3,975.82	(129.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,105.21	3,975.82	(129.39)	0.00	
2025000568	06123197	RE	2025	HATAM, MATTHEW K & HATAM, AMANDA E	9/11/2025	Value	1,689,800	1,445,000	(244,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,442.24	7,219.22	(1,223.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,442.24	7,219.22	(1,223.02)	0.00	

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2025000790	06129042B	RE	2025	PERRY, FRED S JR	9/22/2025	Value	295,500	128,200	(167,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,372.89	595.62	(777.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,372.89	595.62	(777.27)	0.00	
2025000642	06129087	RE	2025	RYALS, RONNIE GLYNN & RYALS, GINA RANI	9/15/2025	Value	1,261,800	1,037,700	(224,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,303.95	5,184.35	(1,119.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,303.95	5,184.35	(1,119.60)	0.00	
2025000862	06129110	RE	2025	RDFPC LLC	9/29/2025	Value	374,500	283,500	(91,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,739.93	1,317.14	(422.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,739.93	1,317.14	(422.79)	0.00	
2025000402	06147020A	RE	2025	VALDMAN, ANNA & VALDMAN, GEORGIY	9/5/2025	Value	1,940,800	1,449,500	(491,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,696.24	7,241.70	(2,454.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,696.24	7,241.70	(2,454.54)	0.00	
2025000569	06147020H	RE	2025	TSCHEGG, MELISSA & TSCHEGG, CHRISTOPH	9/11/2025	Value	1,008,400	871,400	(137,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,037.97	4,353.51	(684.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,037.97	4,353.51	(684.46)	0.00	
2025000863	06147201	RE	2025	COBB, MICHA & COLLINS, IZYLAH	9/29/2025	Value	2,419,400	2,072,400	(347,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	12,087.32	10,353.71	(1,733.61)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	12,087.32	10,353.71	(1,733.61)	0.00	

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2025000896	06150028	RE	2025	WATTS, JOSHUA L & WATTS, NICOLE D	9/29/2025	Value	414,800	400,400	(14,400)		CHANGE VALUE PER BER
Public Notes:						Tax	2,072.34	2,000.40	(71.94)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,072.34	2,000.40	(71.94)	0.00	
2025000645	06150041B	RE	2025	GLAWE, HEATHER ANNE & GLAWE, JEREMY PAUL	9/15/2025	Value	1,136,300	1,101,600	(34,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,676.95	5,503.59	(173.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,676.95	5,503.59	(173.36)	0.00	
2025000488	06150084	RE	2025	CASTANO, THEODORE & CASTANO, DENISE	9/10/2025	Value	489,600	118,900	(370,700)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	2,446.04	594.02	(1,852.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,446.04	594.02	(1,852.02)	0.00	
2025000525	06150090	RE	2025	O'DONNELL, MATTHEW JAMES & FINKE, CHLOE ANN	9/11/2025	Value	983,900	937,200	(46,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,915.56	4,682.25	(233.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,915.56	4,682.25	(233.31)	0.00	
2025000526	06150125	RE	2025	LINTON, BRYAN CHARLES & LINTON, HALEY M	9/11/2025	Value	668,600	603,000	(65,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,340.33	3,012.59	(327.74)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,340.33	3,012.59	(327.74)	0.00	
2025000527	06150143	RE	2025	KENDRICK, AUBREY EARL III & KENDRICK, ANGELA M PECO	9/11/2025	Value	606,500	535,400	(71,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,030.07	2,674.86	(355.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,030.07	2,674.86	(355.21)	0.00	

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2025000883	06153141	RE	2025	HORNE, SUSAN EASTMAN & HORNE, TED GRAHAM	9/29/2025	Value	2,308,500	1,604,000	(704,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	11,533.27	8,013.58	(3,519.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	11,533.27	8,013.58	(3,519.69)	0.00	
2025000856	06153208	RE	2025	SENGUPTA, MEENAKSHI & GUPTA, PARTHA SEN	9/29/2025	Value	1,780,800	1,297,900	(482,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,896.88	6,484.31	(2,412.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,896.88	6,484.31	(2,412.57)	0.00	
2025000687	06156004E01	RE	2025	ANDRUS, SEBASTIAN ALIN & ANDRUS, NICOLE JUNE	9/15/2025	Value	239,000	59,800	(179,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,110.39	277.83	(832.56)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,110.39	277.83	(832.56)	0.00	
2025000557	06156311	RE	2025	BEGLIN, EARL & BEGLIN, NINA	9/11/2025	Value	1,089,500	1,017,200	(72,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,675.21	5,298.59	(376.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,675.21	5,298.59	(376.62)	0.00	
2025000476	06156346	RE	2025	PARSONS, JAMIE L & PARSON, TIMOTHY J	9/9/2025	Value	1,367,900	1,318,200	(49,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,125.39	6,866.50	(258.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,125.39	6,866.50	(258.89)	0.00	
2025000433	06159258	RE	2025	GEORGE, ARUN	9/5/2025	Value	653,200	602,900	(50,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,030.95	4,643.54	(387.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,030.95	4,643.54	(387.41)	0.00	

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2025000472	06159486	RE	2025	HICKMAN, BRETT H & HICKMAN, MENDY W	9/9/2025	Value	1,069,000	940,400	(128,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,233.44	7,242.96	(990.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,233.44	7,242.96	(990.48)	0.00	
2025000777	06162022E	RE	2025	CUTHBERTSON RD I LLC	9/18/2025	Value	402,900	119,300	(283,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,103.14	918.85	(2,184.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,103.14	918.85	(2,184.29)	0.00	
2025000435	06168015E	RE	2025	EZEH, BELINDA & EZEH, ONYEMA AGU	9/8/2025	Value	884,400	735,800	(148,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,811.65	5,667.13	(1,144.52)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,811.65	5,667.13	(1,144.52)	0.00	
2025000673	06168153	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	620,900	556,500	(64,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,782.17	4,286.16	(496.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,782.17	4,286.16	(496.01)	0.00	
2025000778	06174093	RE	2025	TURNER, TERESA D & TURNER, WALLACE REID JR	9/18/2025	Value	1,357,600	1,150,000	(207,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,782.57	5,745.40	(1,037.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,782.57	5,745.40	(1,037.17)	0.00	
2025000646	06177020	RE	2025	HONEYCUTT, SHARON A & HONEYCUTT, ADRIAN STEPH	9/15/2025	Value	966,100	767,300	(198,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,826.64	3,833.43	(993.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,826.64	3,833.43	(993.21)	0.00	

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2025000836	06177100	RE	2025	ALDER, TERESA & ALDER, DAVID	9/25/2025	Value	4,503,800	3,693,000	(810,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	22,500.98	18,450.23	(4,050.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	22,500.98	18,450.23	(4,050.75)	0.00	
2025000473	06180022	RE	2025	CHEN, LING & GONG, LINFENG	9/9/2025	Value	699,900	641,800	(58,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,496.70	3,206.43	(290.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,496.70	3,206.43	(290.27)	0.00	
2025000470	06180023	RE	2025	LINEBERGER, TERRY L TRUSTE & LINEBERGER, DEBRA M TRU	9/9/2025	Value	869,300	777,100	(92,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,343.02	3,882.39	(460.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,343.02	3,882.39	(460.63)	0.00	
2025000474	06180032	RE	2025	REDMON, MICHELE SUE & REDMON, PHILIP LEE	9/9/2025	Value	954,800	888,300	(66,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,770.18	4,437.95	(332.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,770.18	4,437.95	(332.23)	0.00	
2025000559	06180145	RE	2025	DETGEN, PATRICIA S TRUSTEE	9/11/2025	Value	961,600	957,600	(4,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,467.59	4,449.01	(18.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,467.59	4,449.01	(18.58)	0.00	
2025000572	06180193	RE	2025	FROST, NATALIYA & KRAVETS, ANDREY	9/11/2025	Value	1,109,600	1,019,100	(90,500)		CHANGE VALUE PER BER
Public Notes:						Tax	5,155.20	4,734.74	(420.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,155.20	4,734.74	(420.46)	0.00	

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2025000913	06186001P	RE	2025	WALTHER, PAIGE & WALTHER, DAVID	9/30/2025	Value	92,800	58,000	(34,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	431.15	269.47	(161.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	431.15	269.47	(161.68)	0.00	
2025000516	06186033	RE	2025	STEWART, MONA P & STEWART, SEAN P	9/11/2025	Value	981,300	903,400	(77,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,559.12	4,197.20	(361.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,559.12	4,197.20	(361.92)	361.92	
2025000395	06186049	RE	2025	MOAKLER, DAVID EDWARD & MOAKLER, ELIZABETH C	9/4/2025	Value	1,088,800	988,000	(100,800)		SQUARE FOOTAGE
Public Notes:						Tax	5,058.56	4,590.25	(468.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,058.56	4,590.25	(468.31)	0.00	
2025000395	06186049	RE	2024	MOAKLER, DAVID EDWARD & MOAKLER, ELIZABETH C	9/4/2025	Value	890,800	851,300	(39,500)		SQUARE FOOTAGE
Public Notes:						Tax	5,592.44	5,344.46	(247.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,592.44	5,344.46	(247.98)	247.98	
2025000395	06186049	RE	2023	MOAKLER, DAVID EDWARD & MOAKLER, ELIZABETH C	9/4/2025	Value	890,800	851,300	(39,500)		SQUARE FOOTAGE
Public Notes:						Tax	5,571.95	5,324.88	(247.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,571.95	5,324.88	(247.07)	247.07	
2025000395	06186049	RE	2022	MOAKLER, DAVID EDWARD & MOAKLER, ELIZABETH C	9/4/2025	Value	890,800	851,300	(39,500)		SQUARE FOOTAGE
Public Notes:						Tax	5,571.95	5,324.88	(247.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,571.95	5,324.88	(247.07)	247.07	

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2025000395	06186049	RE	2021	MOAKLER, DAVID EDWARD & MOAKLER, ELIZABETH C	9/4/2025	Value	890,800	851,300	(39,500)		SQUARE FOOTAGE
Public Notes:						Tax	5,559.48	5,312.96	(246.52)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,559.48	5,312.96	(246.52)	246.52	
2025000395	06186049	RE	2020	MOAKLER, DAVID EDWARD & MOAKLER, ELIZABETH C	9/4/2025	Value	630,800	590,100	(40,700)		SQUARE FOOTAGE
Public Notes:						Tax	4,857.79	4,544.36	(313.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,857.79	4,544.36	(313.43)	313.43	
2025000500	06186061	RE	2025	JONES, WENDY P & JONES, RUSSELL D	9/10/2025	Value	969,800	930,700	(39,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,505.69	4,324.03	(181.66)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,505.69	4,324.03	(181.66)	0.00	
2025000746	06186164	RE	2025	STEUP, JEFFREY M & STEUP, CHRISTINE M	9/17/2025	Value	809,400	757,100	(52,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,107.73	5,713.08	(394.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,107.73	5,713.08	(394.65)	0.00	
2025000501	06189002 01	RE	2025	KING, JUDITH P & KING, JIMMY RAY	9/10/2025	Value	672,100	598,100	(74,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,227.42	2,872.08	(355.34)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,227.42	2,872.08	(355.34)	0.00	
2025000573	06189008	RE	2025	CARMICHAEL, NOREEN & CARMICHAEL, CHRIS	9/11/2025	Value	1,306,100	1,220,300	(85,800)		CHANGE VALUE PER BER
Public Notes:						Tax	6,803.47	6,356.54	(446.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,803.47	6,356.54	(446.93)	0.00	

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2025000503	06189015	RE	2025	WISE, AVERY H	9/11/2025	Value	734,100	678,100	(56,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,823.93	3,532.22	(291.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,823.93	3,532.22	(291.71)	0.00	
2025000504	06189035	RE	2025	THOMAS, PATRICK OLIVER	9/11/2025	Value	1,003,700	943,500	(60,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,228.27	4,914.69	(313.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,228.27	4,914.69	(313.58)	0.00	
2025000671	06189037	RE	2025	DEMAURY, JULIA ALLEN & DEMAURY, JOSHUA STEVEN	9/15/2025	Value	1,321,600	1,008,900	(312,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,884.21	5,255.36	(1,628.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,884.21	5,255.36	(1,628.85)	0.00	
2025000923	06189043	RE	2025	STEPHENS, MARK	9/30/2025	Value	1,636,200	1,179,100	(457,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,522.97	6,141.93	(2,381.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,522.97	6,141.93	(2,381.04)	0.00	
2025000459	06189049	RE	2025	PROESCHER, MORGAN BOEHM TR & PROESCHER, CATHERINE CL	9/8/2025	Value	2,131,400	1,986,200	(145,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	10,234.98	9,537.73	(697.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,234.98	9,537.73	(697.25)	0.00	
2025000505	06189050	RE	2025	PRENDERGAST, DONNA E & PRENDERGAST, JAMES O	9/11/2025	Value	1,101,700	1,054,400	(47,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,738.76	5,492.37	(246.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,738.76	5,492.37	(246.39)	0.00	

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2025000506	06189074	RE	2025	MCQUAY, TERRY L & MCQUAY, LINDA	9/11/2025	Value	890,200	799,800	(90,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,637.05	4,166.16	(470.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,637.05	4,166.16	(470.89)	0.00	
2025000391	06189075	RE	2025	MONTICELLO, BROOKE & MONTICELLO, MICHAEL H I	9/4/2025	Value	1,679,100	1,368,400	(310,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,746.43	7,128.00	(1,618.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,746.43	7,128.00	(1,618.43)	0.00	
2025000507	06189082	RE	2025	VANGURP, JOHN R & VANGURP, MARY K	9/11/2025	Value	1,636,300	1,454,600	(181,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,523.49	7,577.01	(946.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,523.49	7,577.01	(946.48)	0.00	
2025000508	06189109	RE	2025	JACKSON, HOLLY HUNTER & JACKSON, ANDREW SCOTT	9/11/2025	Value	1,684,300	1,516,100	(168,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,773.52	7,897.36	(876.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,773.52	7,897.36	(876.16)	0.00	
2025000387	06192018A	RE	2025	KOVENDI, MIHAELA N & KOVENDI, SANDOR ATTILA	9/4/2025	Value	577,600	456,000	(121,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,773.64	2,189.71	(583.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,773.64	2,189.71	(583.93)	0.00	
2025000842	06192205	RE	2025	LAYTON, HEATHER R & LAYTON, JAMES C	9/25/2025	Value	737,600	687,600	(50,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,681.00	5,295.90	(385.10)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,681.00	5,295.90	(385.10)	0.00	

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2025000672	06192500	RE	2025	AMH 2015-2 BORROWER LLC	9/15/2025	Value	571,400	540,700	(30,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,400.92	4,164.47	(236.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,400.92	4,164.47	(236.45)	0.00	
2025000574	06198456	RE	2025	RUBOTTOM, KELLY D & RUBOTTOM, JENNIFER P	9/11/2025	Value	805,200	719,100	(86,100)		CHANGE VALUE PER BER
Public Notes:						Tax	3,740.96	3,340.94	(400.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,740.96	3,340.94	(400.02)	0.00	
2025000456	06201502	RE	2025	CLOSTER, MARGARET M & CLOSTER, GEORGE K	9/8/2025	Value	619,900	530,000	(89,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,880.06	2,462.38	(417.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,880.06	2,462.38	(417.68)	0.00	
2025000478	06201508	RE	2025	GONEK, MIROSLAW & GONEK, RENATA	9/9/2025	Value	663,600	611,700	(51,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,083.09	2,841.96	(241.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,083.09	2,841.96	(241.13)	0.00	
2025000475	06201518	RE	2025	PRINGLE, CHRISTINE	9/9/2025	Value	610,600	572,500	(38,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,836.85	2,659.84	(177.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,836.85	2,659.84	(177.01)	0.00	
2025000665	06204217	RE	2025	MAZUR, JAKUB B & MAZUR, CHRISTINE D	9/15/2025	Value	1,465,600	1,367,100	(98,500)		CHANGE VALUE PER BER
Public Notes:						Tax	6,809.18	6,351.55	(457.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,809.18	6,351.55	(457.63)	0.00	

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2025000774	06204240	RE	2025	PATEL, PINAL A & PATEL, ANAND B	9/18/2025	Value	1,878,500	1,749,200	(129,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,727.51	8,126.78	(600.73)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,727.51	8,126.78	(600.73)	0.00	
2025000924	06204278	RE	2025	FARENGA, ANTHONY	9/30/2025	Value	1,067,366	911,766	(155,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,958.99	4,236.07	(722.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,958.99	4,236.07	(722.92)	0.00	
2025000479	06207079	RE	2025	MOKRIS, TAYLOR MICHAEL & MOKRIS, ASHLEY F	9/9/2025	Value	1,079,000	966,700	(112,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,013.03	4,491.29	(521.74)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,013.03	4,491.29	(521.74)	0.00	
2025000454	06207112	RE	2025	CAMPBELL, REGINA M & CAMPBELL, MELVIN T	9/8/2025	Value	3,138,200	2,909,000	(229,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	14,580.08	13,515.21	(1,064.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	14,580.08	13,515.21	(1,064.87)	0.00	
2025000389	06210004C	RE	2025	GRISSET, JILL C & GRISSET, SCOTT J	9/4/2025	Value	351,100	87,800	(263,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,828.88	457.35	(1,371.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,828.88	457.35	(1,371.53)	0.00	
2025000509	06210064	RE	2025	WALSER, MARK & WALSER, KRISTIN	9/11/2025	Value	1,115,800	1,010,000	(105,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,812.20	5,261.09	(551.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,812.20	5,261.09	(551.11)	0.00	

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2025000773	06210141	RE	2025	PATEL, SHYAMA & PATEL, DHAVAL	9/18/2025	Value	1,060,500	954,700	(105,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,927.08	4,435.54	(491.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,927.08	4,435.54	(491.54)	0.00	
2025000510	06213014	RE	2025	XIAO, JIPING & TIAN, MIAOMIAO	9/11/2025	Value	1,320,900	1,064,200	(256,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,880.57	5,543.42	(1,337.15)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,880.57	5,543.42	(1,337.15)	0.00	
2025000511	06213019	RE	2025	STURGEON, JULIANA EILEEN T & STURGEON, KEVIN MCMURRA	9/11/2025	Value	1,174,100	1,025,700	(148,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,115.89	5,342.87	(773.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,115.89	5,342.87	(773.02)	773.02	
2025000512	06213022	RE	2025	MCLEOD, MARTA A & MCLEOD, RALPH OWEN	9/11/2025	Value	1,184,400	1,043,100	(141,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,169.54	5,433.51	(736.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,169.54	5,433.51	(736.03)	0.00	
2025000513	06213023	RE	2025	ADCOCK CONSTRUCTION INC	9/11/2025	Value	1,014,700	932,400	(82,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,285.57	4,856.87	(428.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,285.57	4,856.87	(428.70)	0.00	
2025000477	06213039	RE	2025	JONES, JENNIFER A & JONES, JEFFREY M	9/9/2025	Value	2,173,300	1,966,000	(207,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	11,320.72	10,240.89	(1,079.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	11,320.72	10,240.89	(1,079.83)	0.00	

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2025000926	06213042	RE	2025	TALBERT, JASON & KOWALASKY, KORIN	9/30/2025	Value	1,458,200	1,062,200	(396,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,595.76	5,533.00	(2,062.76)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,595.76	5,533.00	(2,062.76)	0.00	
2025000453	06213048	RE	2025	DWIGHT, GINNY RAE & DWIGHT, GEORGE SINGLETO	9/8/2025	Value	2,096,300	1,937,700	(158,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	10,066.43	9,304.84	(761.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,066.43	9,304.84	(761.59)	0.00	
2025000388	06213062	RE	2025	SNAPPER, RUSSELL CHARLES T & SNAPPER, STACY ANNE TRU	9/4/2025	Value	1,704,700	1,397,500	(307,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,879.78	7,279.58	(1,600.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,879.78	7,279.58	(1,600.20)	0.00	
2025000747	06222506	RE	2025	PATEL, PRANAV V CO TRUSTEE & PATEL, RIPAL PRANAV CO	9/17/2025	Value	1,378,500	1,250,000	(128,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,180.61	6,511.25	(669.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,180.61	6,511.25	(669.36)	0.00	
2025000515	06225052	RE	2025	SMITH, CHRISTOPHER & CATES, KELLY	9/11/2025	Value	1,317,600	1,040,200	(277,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,863.38	5,418.40	(1,444.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,863.38	5,418.40	(1,444.98)	0.00	
2025000839	06225177	RE	2025	RAHKO, DANIEL R	9/25/2025	Value	2,132,900	1,656,600	(476,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,909.45	7,696.56	(2,212.89)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,909.45	7,696.56	(2,212.89)	0.00	

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2025000436	06225397	RE	2025	ALMEIDA, AUDRA E & ALMEIDA, JEFFERY D	9/8/2025	Value	1,337,100	1,260,300	(76,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,212.17	5,855.35	(356.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,212.17	5,855.35	(356.82)	0.00	
2025000558	06228091	RE	2025	DOBRO, DAVID L	9/11/2025	Value	1,952,300	1,796,200	(156,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	9,070.39	8,345.15	(725.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,070.39	8,345.15	(725.24)	0.00	
2025000914	06231001C	RE	2025	CH NESBIT LLC	9/30/2025	Value	207,700	62,800	(144,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	964.97	291.77	(673.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	964.97	291.77	(673.20)	0.00	
2025000922	06240253	RE	2025	JCH OP LLC	9/30/2025	Value	69,300	17,300	(52,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	360.98	90.12	(270.86)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	360.98	90.12	(270.86)	0.00	
2025000575	07006004	RE	2025	LEDBETTER, DALE G	9/11/2025	Value	1,203,700	919,700	(284,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,740.45	4,386.05	(1,354.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,740.45	4,386.05	(1,354.40)	0.00	
2025000909	07018017C	RE	2025	CUNNINGHAM, MARILYN DENISE	9/29/2025	Value	833,000	698,400	(134,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,972.58	3,330.67	(641.91)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,972.58	3,330.67	(641.91)	0.00	

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2025000920	07021003E	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	325,700	280,900	(44,800)		CHANGE VALUE PER BER
Public Notes:						Tax	2,106.95	1,817.14	(289.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,106.95	1,817.14	(289.81)	0.00	
2025000455	07024018H	RE	2025	GAULT, KAREN CHRISTENSEN & GAULT, BRIAN KEITH	9/8/2025	Value	793,800	709,400	(84,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,785.63	3,383.13	(402.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,785.63	3,383.13	(402.50)	0.00	
2025000406	07027023	RE	2025	RORIE, JOSEPH CLAY & RORIE, JOSIE H	9/5/2025	Value	718,400	0	(718,400)		TAX CODE CHANGE
Public Notes:						Tax	4,696.90	0.00	(4,696.90)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,696.90	0.00	(4,696.90)	0.00	
2025000561	07033276	RE	2025	2017-2 IH BORROWER LP	9/11/2025	Value	461,300	419,100	(42,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,071.80	2,790.79	(281.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,071.80	2,790.79	(281.01)	0.00	
2025000576	07036003E	RE	2025	EDWARDS, CINDY DENISE & EDWARDS, WENDY DAWN	9/11/2025	Value	695,100	451,800	(243,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,314.93	2,154.63	(1,160.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,314.93	2,154.63	(1,160.30)	0.00	
2025000693	07045162	RE	2025	AMH 2015-1 BORROWER LLC	9/15/2025	Value	415,900	392,200	(23,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,690.46	2,537.14	(153.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,690.46	2,537.14	(153.32)	0.00	

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2025000919	07048066	RE	2025	GODWIN, CATHY HAYES & TAYLOR, LINDA HAYES ET	9/30/2025	Value	834,900	392,600	(442,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,039.25	1,899.40	(2,139.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,039.25	1,899.40	(2,139.85)	0.00	
2025000795	07048066B	RE	2025	GODWIN, CATHY ANNE HAYES & GODWIN, WILLIAM S	9/22/2025	Value	343,700	293,600	(50,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,662.82	1,420.44	(242.38)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,662.82	1,420.44	(242.38)	0.00	
2025000794	07048066C	RE	2025	TAYLOR, LINDA H & TAYLOR, DONALD WAYNE	9/22/2025	Value	145,200	88,600	(56,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	702.48	428.65	(273.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	702.48	428.65	(273.83)	0.00	
2025000934	07057009	RE	2025	DEESE, DEBORAH B & DEESE, EARL B II	9/30/2025	Value	469,400	441,700	(27,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,125.73	2,941.28	(184.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,125.73	2,941.28	(184.45)	0.00	
2025000637	07057302	RE	2025	SEPULVEDA, LUIS FERNANDO P	9/15/2025	Value	514,900	372,400	(142,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,330.89	2,409.06	(921.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,330.89	2,409.06	(921.83)	0.00	
2025000688	07057650	RE	2025	PROPERTIES, FOUR LLC & AMERICAN HOMES 4 RENT	9/15/2025	Value	574,600	424,400	(150,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,717.09	2,745.44	(971.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,717.09	2,745.44	(971.65)	0.00	

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2025000692	07057660	RE	2025	AMH 2014-3 BORROWER LLC	9/15/2025	Value	474,900	366,100	(108,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,072.13	2,368.30	(703.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,072.13	2,368.30	(703.83)	0.00	
2025000700	07057671	RE	2025	AMH 2014-3 BORROWER LLC	9/15/2025	Value	549,400	400,700	(148,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,554.07	2,592.13	(961.94)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,554.07	2,592.13	(961.94)	0.00	
2025000384	07057673	RE	2025	PROGRESS RESIDENTIAL BORRO	9/4/2025	Value	450,900	406,500	(44,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,916.87	2,629.65	(287.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,916.87	2,629.65	(287.22)	0.00	
2025000678	07057675	RE	2025	AMH 2014-2 BORROWER LLC	9/15/2025	Value	475,800	366,500	(109,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,077.95	2,370.89	(707.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,077.95	2,370.89	(707.06)	0.00	
2025000701	07057677	RE	2025	AMH 2015-2 BORROWER LLC	9/15/2025	Value	458,200	356,300	(101,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,964.10	2,304.90	(659.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,964.10	2,304.90	(659.20)	0.00	
2025000681	07057775	RE	2025	AMH 2014-3 BORROWER LLC	9/15/2025	Value	534,200	408,300	(125,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,455.74	2,641.29	(814.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,455.74	2,641.29	(814.45)	0.00	

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2025000674	07057780	RE	2025	AMH 2015-2 BORROWER LLC	9/15/2025	Value	453,100	351,500	(101,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,931.10	2,273.85	(657.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,931.10	2,273.85	(657.25)	0.00	
2025000677	07057781	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	481,700	369,700	(112,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,116.12	2,391.59	(724.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,116.12	2,391.59	(724.53)	0.00	
2025000689	07057783	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	553,300	421,800	(131,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,579.30	2,728.62	(850.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,579.30	2,728.62	(850.68)	0.00	
2025000691	07057797	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	486,800	371,100	(115,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,149.11	2,400.65	(748.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,149.11	2,400.65	(748.46)	0.00	
2025000676	07057804	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	541,200	411,400	(129,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,501.02	2,661.35	(839.67)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,501.02	2,661.35	(839.67)	0.00	
2025000381	07057962	RE	2025	MALARKEY, RICHARD A JR & MALARKEY, JESSICA M	9/4/2025	Value	647,300	625,200	(22,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,187.38	4,044.42	(142.96)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,187.38	4,044.42	(142.96)	0.00	

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2025000449	07063252L05	RE	2025	GARMON, ALLISON STEPHENS	9/8/2025	Value	350,900	300,800	(50,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,234.88	1,915.80	(319.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,234.88	1,915.80	(319.08)	0.00	
2025000481	07063298	RE	2025	HINSON, SANDRA L	9/9/2025	Value	63,900	42,400	(21,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	304.74	202.21	(102.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	304.74	202.21	(102.53)	0.00	
2025000482	07063327	RE	2025	SOLODYANKIN, MAKSIM V	9/9/2025	Value	65,700	44,200	(21,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	313.32	210.79	(102.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	313.32	210.79	(102.53)	102.53	
2025000890	07063524	RE	2025	GRIFFIN, ALEXANDER R & GRIFFIN, ROGER G	9/29/2025	Value	474,800	424,600	(50,200)		CHANGE VALUE PER BER
Public Notes:						Tax	3,024.00	2,704.28	(319.72)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,024.00	2,704.28	(319.72)	0.00	
2025000560	07063654	RE	2025	BUTLER, JOHN M & BUTLER, KRISTINA M	9/11/2025	Value	636,500	518,100	(118,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,053.87	3,299.78	(754.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,053.87	3,299.78	(754.09)	0.00	
2025000680	07063759	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	577,300	547,200	(30,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,676.82	3,485.12	(191.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,676.82	3,485.12	(191.70)	0.00	

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2025000682	07063926	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	474,500	430,000	(44,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,022.09	2,738.67	(283.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,022.09	2,738.67	(283.42)	0.00	
2025000679	07064305	RE	2025	AMH 2015-2 BORROWER LLC	9/15/2025	Value	454,100	414,500	(39,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,892.16	2,639.95	(252.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,892.16	2,639.95	(252.21)	0.00	
2025000675	07069316	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	394,900	342,100	(52,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,581.86	2,236.65	(345.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,581.86	2,236.65	(345.21)	0.00	
2025000564	07072007	RE	2025	LIQUID MANAGEMENT LLC	9/11/2025	Value	980,700	650,000	(330,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,411.82	4,249.70	(2,162.12)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,411.82	4,249.70	(2,162.12)	0.00	
2025000793	07072013B	RE	2025	THOMAS, VICTOR ALAN TURSTE & THOMAS, SUSAN HAYES TRU	9/22/2025	Value	560,600	438,700	(121,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,712.18	2,122.43	(589.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,712.18	2,122.43	(589.75)	0.00	
2025000664	07075096	RE	2025	MEHNERT, ROSEMARIE & MEHNERT, DONALD W	9/15/2025	Value	724,900	706,800	(18,100)		CHANGE VALUE PER BER
Public Notes:						Tax	4,827.11	4,706.58	(120.53)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,827.11	4,706.58	(120.53)	0.00	

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2025000775	07084315	RE	2025	INDIAN TRAILS PARTNERS LLC	9/18/2025	Value	3,103,600	2,760,300	(343,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	20,077.19	17,856.38	(2,220.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	20,077.19	17,856.38	(2,220.81)	0.00	
2025000562	07084478	RE	2025	HALL, MELANIE M & HALL, JAMES MICHAEL	9/11/2025	Value	530,500	519,500	(11,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,378.75	3,308.70	(70.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,378.75	3,308.70	(70.05)	0.00	
2025000683	07084524	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	497,000	475,000	(22,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,165.39	3,025.28	(140.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,165.39	3,025.28	(140.11)	0.00	
2025000617	07087035	RE	2025	SKAGGS, JAMES E & SKAGGS, PATRICIA E	9/12/2025	Value	412,500	356,600	(55,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,682.90	2,319.33	(363.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,682.90	2,319.33	(363.57)	0.00	
2025000437	07090333	RE	2025	BARTOS, MORGAN A & BARTOS, GREGORY AARON	9/8/2025	Value	504,400	480,100	(24,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,280.62	3,122.57	(158.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,280.62	3,122.57	(158.05)	0.00	
2025000699	07090958	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	530,900	512,900	(18,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,471.02	3,353.34	(117.68)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,471.02	3,353.34	(117.68)	0.00	

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2025000685	07090966	RE	2025	AMH 2015-1 BORROWER LLC	9/15/2025	Value	612,800	589,700	(23,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,006.49	3,855.46	(151.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,006.49	3,855.46	(151.03)	0.00	
2025000694	07091066	RE	2025	AMERICAN HOMES 4 RENT PROP	9/15/2025	Value	591,000	575,300	(15,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,863.96	3,761.31	(102.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,863.96	3,761.31	(102.65)	0.00	
2025000894	07093426	RE	2025	LONG, J MICHAEL & LONG, CHARLENE A	9/29/2025	Value	420,500	419,800	(700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,953.64	1,950.39	(3.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,953.64	1,950.39	(3.25)	0.00	
2025000382	07099045	RE	2025	SLADE, STEPHANIE DENISE	9/4/2025	Value	297,200	294,600	(2,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,989.46	1,972.05	(17.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,989.46	1,972.05	(17.41)	0.00	
2025000912	07099146	RE	2025	HARGETT, BARBARA B & HARGETT, WYATT P JR	9/30/2025	Value	98,100	24,500	(73,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	471.27	117.70	(353.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	471.27	117.70	(353.57)	0.00	
2025000383	07099352	RE	2025	JACOBS, MARTIN ANDREW JR	9/4/2025	Value	332,800	325,200	(7,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,227.76	2,176.89	(50.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,227.76	2,176.89	(50.87)	0.00	

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2025000457	07102060	RE	2025	SIMON, WENDY A	9/8/2025	Value	340,100	307,200	(32,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,276.63	2,056.40	(220.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,276.63	2,056.40	(220.23)	0.00	
2025000396	07102097	RE	2025	HORNE, JANSEN	9/5/2025	Value	324,300	320,500	(3,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,170.86	2,145.43	(25.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,170.86	2,145.43	(25.43)	0.00	
2025000906	07102151	RE	2025	KATUWAL, AMBIKA & GHIMIRE, SHURESH	9/29/2025	Value	564,500	463,200	(101,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,778.76	3,100.66	(678.10)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,778.76	3,100.66	(678.10)	0.00	
2025000438	07114107	RE	2025	WALTERS, KELLIE M	9/8/2025	Value	410,200	386,700	(23,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,667.94	2,515.10	(152.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,667.94	2,515.10	(152.84)	0.00	
2025000439	07117029	RE	2025	BLANCHARD, DALE	9/8/2025	Value	400,900	359,100	(41,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,925.92	1,725.12	(200.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,925.92	1,725.12	(200.80)	0.00	
2025000440	07117030	RE	2025	WILLIAMS, MEGAN DEAL & WILLIAMS, KELLEN ANDREW	9/8/2025	Value	1,004,200	906,700	(97,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,824.18	4,355.79	(468.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,824.18	4,355.79	(468.39)	0.00	

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2025000868	07117030D	RE	2025	HIMMEL, JENNIFER DEEN & HIMMEL, MATTHEW JAMES	9/29/2025	Value	919,900	730,700	(189,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,419.20	3,510.28	(908.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,419.20	3,510.28	(908.92)	0.00	
2025000834	07117034L	RE	2025	DEAN, JENNIFER HELMS & DEAN, BRIAN EDWARD	9/25/2025	Value	768,100	652,700	(115,400)		CHANGE VALUE PER BER
Public Notes:						Tax	4,995.72	4,245.16	(750.56)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,995.72	4,245.16	(750.56)	0.00	
2025000791	07123016A	RE	2025	HARRISON, SHERLYN & MEDLIN, VICTOR ALAN	9/22/2025	Value	224,100	66,700	(157,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,091.59	324.90	(766.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,091.59	324.90	(766.69)	0.00	
2025000486	07123018	RE	2025	CHANDLER, JANICE S & CHANDLER, WALTER CARL S	9/9/2025	Value	715,200	696,700	(18,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,483.74	3,393.63	(90.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,483.74	3,393.63	(90.11)	0.00	
2025000523	07123141	RE	2025	LATIS, MICHELLE PALINCAS & LATIS, GABRIEL PALINCAS	9/11/2025	Value	1,437,800	1,224,400	(213,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,680.02	5,688.56	(991.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,680.02	5,688.56	(991.46)	0.00	
2025000441	07123271	RE	2025	POPA, NICOLAE L	9/8/2025	Value	608,500	561,100	(47,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,861.54	3,560.74	(300.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,861.54	3,560.74	(300.80)	0.00	

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2025000619	07123291	RE	2025	HOWELL, ROBERT ALLEN TRUST & HOWELL, JOAN LOIS TRUST	9/12/2025	Value	581,100	481,400	(99,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,687.66	3,054.96	(632.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,687.66	3,054.96	(632.70)	0.00	
2025000869	07123335	RE	2025	JOBY, SUMITHA & KURIAN, THOMAS	9/29/2025	Value	725,900	649,000	(76,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,606.56	4,118.55	(488.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,606.56	4,118.55	(488.01)	0.00	
2025000442	07126130	RE	2025	MCCANN, TIMOTHY C & MCCANN, DENISE	9/8/2025	Value	312,600	301,000	(11,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,092.54	2,014.89	(77.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,092.54	2,014.89	(77.65)	77.65	
2025000900	07129663	RE	2025	BLASZAK, SUZANNE M	9/29/2025	Value	382,400	379,800	(2,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,559.79	2,542.38	(17.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,559.79	2,542.38	(17.41)	0.00	
2025000903	07129729	RE	2025	MURRAY, JOSEPH ROBERT & HUSSON, ERIN JOANNE	9/29/2025	Value	382,200	381,900	(300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,558.45	2,556.44	(2.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,558.45	2,556.44	(2.01)	0.00	
2025000647	07129748	RE	2025	REED, JULIE & REED, BRIAN W	9/15/2025	Value	422,300	403,700	(18,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,826.88	2,702.37	(124.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,826.88	2,702.37	(124.51)	0.00	

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2025000443	07132008	RE	2025	COHEN, WENDY E & COHEN, WAYNE PHILLIP	9/8/2025	Value	551,100	489,800	(61,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,584.35	3,185.66	(398.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,584.35	3,185.66	(398.69)	0.00	
2025000565	07132045B	RE	2025	GIANNIBAS, HRISTOULA G & GIANNIBAS, TOM	9/11/2025	Value	236,600	80,400	(156,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,538.85	522.92	(1,015.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,538.85	522.92	(1,015.93)	0.00	
2025000444	07132141	RE	2025	LUCKADOO, JOHN MICHAEL	9/8/2025	Value	424,700	370,000	(54,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,762.25	2,406.48	(355.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,762.25	2,406.48	(355.77)	0.00	
2025000445	07132145	RE	2025	GOLDSTEIN, IAN & GOLDSTEIN, COLLEEN	9/8/2025	Value	354,400	339,500	(14,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,305.02	2,208.11	(96.91)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,305.02	2,208.11	(96.91)	0.00	
2025000929	07132348	RE	2025	O'MALLEY-SANTORO, DONNA	9/30/2025	Value	483,700	403,700	(80,000)		CHANGE VALUE PER BER
Public Notes:						Tax	3,145.98	2,625.66	(520.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,145.98	2,625.66	(520.32)	0.00	
2025000448	07132463	RE	2025	KELLY, JOHN F III & KELLY, DEBRA	9/8/2025	Value	356,200	341,700	(14,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,384.40	2,287.34	(97.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,384.40	2,287.34	(97.06)	0.00	

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2025000446	07135016A	RE	2025	RAZZANO, JEFFREY P	9/8/2025	Value	392,300	335,100	(57,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,884.61	1,609.82	(274.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,884.61	1,609.82	(274.79)	0.00	
2025000620	07135050G	RE	2025	ALSOBROOKS PROPERTIES LLC	9/12/2025	Value	132,800	32,200	(100,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	863.73	209.43	(654.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	863.73	209.43	(654.30)	0.00	
2025000726	07135079	RE	2025	STONE, BONITA K	9/16/2025	Value	170,305	150,505	(19,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,107.66	978.88	(128.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,107.66	978.88	(128.78)	0.00	
2025000650	07141046	RE	2025	SCOTT, DEBRA A & SCOTT, RODNEY E	9/15/2025	Value	1,263,900	1,207,900	(56,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,220.41	7,856.18	(364.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,220.41	7,856.18	(364.23)	0.00	
2025000882	07141092	RE	2025	LEE, EUN JUNG	9/29/2025	Value	804,800	640,000	(164,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,387.33	4,284.16	(1,103.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,387.33	4,284.16	(1,103.17)	0.00	
2025000893	07144654A	RE	2025	FUNDERBURGH, CARRIE & FUNDERBURGH, CHARLES	9/29/2025	Value	589,700	576,800	(12,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,947.45	3,861.10	(86.35)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,947.45	3,861.10	(86.35)	0.00	

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2025000864	07147098	RE	2025	MAJJI, ROOPAVANI	9/29/2025	Value	464,600	440,500	(24,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,021.76	2,865.01	(156.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,021.76	2,865.01	(156.75)	0.00	
2025000841	07147561	RE	2025	TYSON, PAULA WILLIAMS	9/25/2025	Value	550,500	498,300	(52,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,685.05	3,335.62	(349.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,685.05	3,335.62	(349.43)	0.00	
2025000928	07147708	RE	2025	FARBER, PATRICIA MORAN & FARBER, DAVID J	9/30/2025	Value	601,500	594,000	(7,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,889.61	2,853.58	(36.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,889.61	2,853.58	(36.03)	0.00	
2025000570	07147746	RE	2025	BROOCKERD, BRONSON & BROOCKERD, CHRISTI L	9/11/2025	Value	1,371,200	1,277,500	(93,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,918.28	8,308.86	(609.42)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,918.28	8,308.86	(609.42)	0.00	
2025000638	07147912	RE	2025	DIDONATO, KRISTINE & DIDONATO, RAYMOND A	9/15/2025	Value	666,300	590,700	(75,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,460.21	3,954.15	(506.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,460.21	3,954.15	(506.06)	0.00	
2025000467	07150001V	RE	2025	GURLOV, ALEXANDER & GURLOV, LYUBOV	9/9/2025	Value	826,100	747,800	(78,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,968.58	3,592.43	(376.15)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,968.58	3,592.43	(376.15)	0.00	

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2025000412	07150022	RE	2025	CANTERBURY, JESSICA & CANTERBURY, JASON E	9/5/2025	Value	630,300	493,600	(136,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,099.47	3,210.37	(889.10)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,099.47	3,210.37	(889.10)	0.00	
2025000521	07150033A	RE	2025	HAMILTON, SARAH M & HAMILTON, DAVID M	9/11/2025	Value	601,400	507,000	(94,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,911.51	3,297.53	(613.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,911.51	3,297.53	(613.98)	0.00	
2025000865	07150075	RE	2025	DAVIS, JEFFERY S & DAVIS, PAMELA S	9/29/2025	Value	939,700	709,200	(230,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,694.74	3,543.16	(1,151.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,694.74	3,543.16	(1,151.58)	0.00	
2025000471	07150092	RE	2025	KRESAK, BRENDA JAMISON & KRESAK, MARK ALLAN	9/9/2025	Value	713,700	695,500	(18,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,565.65	3,474.72	(90.93)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,565.65	3,474.72	(90.93)	0.00	
2025000875	07150104	RE	2025	HAYDN, SARAH ANN TRUSTEE & HAYDN, MICHAEL TRUSTEE	9/29/2025	Value	935,100	751,700	(183,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,671.76	3,755.49	(916.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,671.76	3,755.49	(916.27)	0.00	
2025000522	07150107	RE	2025	GOODMAN, DONNA & GOODMAN, DARYL W	9/11/2025	Value	936,000	895,700	(40,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,676.26	4,474.92	(201.34)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,676.26	4,474.92	(201.34)	0.00	

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2025000545	07150148	RE	2025	STROSSER, DENISE M & STROSSER, MATTHEW C	9/11/2025	Value	772,500	736,300	(36,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,024.34	4,788.90	(235.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,024.34	4,788.90	(235.44)	0.00	
2025000888	07150270	RE	2025	LI, ERQIAN	9/29/2025	Value	1,089,500	1,049,600	(39,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,086.11	6,826.60	(259.51)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,086.11	6,826.60	(259.51)	0.00	
2025000898	07150572	RE	2025	PIOTROWSKI, SARAH C & PIOTROWSKI, MARK T	9/29/2025	Value	774,400	755,700	(18,700)		CHANGE VALUE PER BER
Public Notes:						Tax	5,036.70	4,915.07	(121.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,036.70	4,915.07	(121.63)	0.00	
2025000499	08033003	RE	2025	DALTON, JERRY B & DALTON, CYNTHIA S	9/10/2025	Value	259,400	211,700	(47,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,311.27	1,070.14	(241.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,311.27	1,070.14	(241.13)	0.00	
2025000649	08150010	RE	2025	TUCKER, ERIC & TUCKER, JANET	9/15/2025	Value	166,500	118,000	(48,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	850.32	602.63	(247.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	850.32	602.63	(247.69)	0.00	
2025000623	08201003H	RE	2025	PARTRIDGE, AARON J & PARTRIDGE, HARRY A	9/12/2025	Value	78,200	33,200	(45,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	397.41	168.72	(228.69)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	397.41	168.72	(228.69)	0.00	

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2025000624	08201004F	RE	2025	SOLODYANKIN, ANATOLIY & SOLODYANKIN, TATYANA	9/12/2025	Value	1,465,800	1,084,400	(381,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	7,449.20	5,510.92	(1,938.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,449.20	5,510.92	(1,938.28)	0.00	
2025000696	08201015E	RE	2025	SMITH, WILLIAM LARRY	9/15/2025	Value	268,100	71,300	(196,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,362.48	362.35	(1,000.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,362.48	362.35	(1,000.13)	0.00	
2025000935	08213020	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	215,900	204,600	(11,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,102.60	1,044.89	(57.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,102.60	1,044.89	(57.71)	0.00	
2025000936	08213020A	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	119,900	30,000	(89,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	612.33	153.21	(459.12)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	612.33	153.21	(459.12)	0.00	
2025000937	08213020B	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	118,700	29,700	(89,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	606.20	151.68	(454.52)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	606.20	151.68	(454.52)	0.00	
2025000938	08213021	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	115,200	28,800	(86,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	588.33	147.08	(441.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	588.33	147.08	(441.25)	0.00	

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2025000939	08213021A	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	217,100	203,000	(14,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,108.73	1,036.72	(72.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,108.73	1,036.72	(72.01)	0.00	
2025000940	08213035A	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	242,500	196,600	(45,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,238.45	1,004.04	(234.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,238.45	1,004.04	(234.41)	0.00	
2025000941	08213035B	RE	2025	GARLOCK, TAMMY LYNN & GARLOCK, JERRY JOHN JR	9/30/2025	Value	259,900	219,700	(40,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,327.31	1,122.01	(205.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,327.31	1,122.01	(205.30)	0.00	
2025000651	08216003C	RE	2025	BUMGARNER, MYRA CLONTZ	9/15/2025	Value	69,500	22,400	(47,100)		CHANGE VALUE PER BER
Public Notes:						Tax	354.94	114.40	(240.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	354.94	114.40	(240.54)	0.00	
2025000625	08231091	RE	2025	SOLOMON, BILLY M & SOLOMON, SHEILA B	9/12/2025	Value	592,800	516,100	(76,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,012.61	2,622.82	(389.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,012.61	2,622.82	(389.79)	0.00	
2025000907	08249007A	RE	2025	COLLINS, DEBORAH M & COLLINS, JOSEPH L	9/29/2025	Value	1,611,700	1,173,000	(438,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	8,230.96	5,990.52	(2,240.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,230.96	5,990.52	(2,240.44)	0.00	

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2025000648	08255013B	RE	2025	ACKERMAN, RITA & ACKERMAN, GRADY K	9/15/2025	Value	167,800	64,600	(103,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	856.95	329.91	(527.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	856.95	329.91	(527.04)	0.00	
2025000629	08267013	RE	2025	BAUCOM, HELEN W & BAUCOM, JAMES TERRELL	9/12/2025	Value	140,400	128,500	(11,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	713.51	653.04	(60.47)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	713.51	653.04	(60.47)	0.00	
2025000626	08279002A	RE	2025	CATO & GOODYEAR CONNECT LL	9/12/2025	Value	2,868,100	2,086,500	(781,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	14,073.77	10,238.46	(3,835.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	14,073.77	10,238.46	(3,835.31)	0.00	
2025000497	08285001C	RE	2025	BRITT, MARSHALL KELLY JR	9/10/2025	Value	334,400	273,800	(60,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,594.75	1,305.75	(289.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,594.75	1,305.75	(289.00)	0.00	
2025000498	08291008	RE	2025	GREENE, FRANCES A	9/10/2025	Value	245,300	231,800	(13,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,252.75	1,183.80	(68.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,252.75	1,183.80	(68.95)	0.00	
2025000483	08291049	RE	2025	MATSENKO, ALEKSANDR	9/9/2025	Value	101,000	25,300	(75,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	653.37	163.67	(489.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	653.37	163.67	(489.70)	0.00	

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2025000563	08300074	RE	2025	JOHONSTON, AMY & JOHNSTON, FORREST	9/11/2025	Value	670,600	601,100	(69,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,862.39	5,254.82	(607.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,862.39	5,254.82	(607.57)	0.00	
2025000636	08312251	RE	2025	CRAPAROTTA, JOSEPH ANTHONY & CRAPAROTTA, LAUREN	9/15/2025	Value	813,500	722,000	(91,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,417.10	4,807.80	(609.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,417.10	4,807.80	(609.30)	0.00	
2025000480	08315001B	RE	2025	NANCE, DENNIS M	9/9/2025	Value	1,072,900	859,200	(213,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,116.66	4,097.52	(1,019.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,116.66	4,097.52	(1,019.14)	0.00	
2025000496	08321092	RE	2025	CING, NIANG ET AL & LANGH, GEEN KHAN	9/10/2025	Value	452,500	441,300	(11,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,013.20	2,938.62	(74.58)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,013.20	2,938.62	(74.58)	0.00	
2025000921	08324085	RE	2025	WIDMANN, REINHARD G	9/30/2025	Value	891,600	708,200	(183,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,937.16	4,715.90	(1,221.26)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,937.16	4,715.90	(1,221.26)	0.00	
2025000495	08324094	RE	2025	GAULT, BOYCE H III & GAULT, ARLENE B	9/10/2025	Value	691,700	653,400	(38,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,606.03	4,350.99	(255.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,606.03	4,350.99	(255.04)	0.00	

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2025000670	09022132	RE	2025	UNION STATION LIMITED PART	9/15/2025	Value	4,387,500	3,341,500	(1,046,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	33,173.89	25,265.08	(7,908.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	33,173.89	25,265.08	(7,908.81)	0.00	
2025000463	09025026 90	RE	2025	SMITH, MICHAEL R & SMITH, TAMMY E	9/9/2025	Value	422,400	380,000	(42,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,137.77	1,923.18	(214.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,137.77	1,923.18	(214.59)	0.00	
2025000460	09025027A	RE	2025	SMITH, MICHAEL R & SMITH, TAMMY E	9/8/2025	Value	59,100	2,100	(57,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	446.86	15.88	(430.98)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	446.86	15.88	(430.98)	0.00	
2025000925	09025029	RE	2025	VICK, JOHN C & VICK, GILES W III	9/30/2025	Value	59,000	2,000	(57,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	298.60	10.12	(288.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	298.60	10.12	(288.48)	0.00	
2025000876	09028018	RE	2025	EVANS, WANDA C	9/29/2025	Value	573,100	460,500	(112,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,900.46	2,330.59	(569.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,900.46	2,330.59	(569.87)	0.00	
2025000887	09028021	RE	2025	RALEIGH, DONALD & RALEIGH, TERESA ANN	9/29/2025	Value	559,700	453,100	(106,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,832.64	2,293.14	(539.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,832.64	2,293.14	(539.50)	0.00	

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2025000386	09052040A	RE	2025	LARRIMORE, CAROL B & LARRIMORE, PETER B	9/4/2025	Value	58,400	1,400	(57,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	441.56	10.59	(430.97)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	441.56	10.59	(430.97)	0.00	
2025000927	09057002I80	RE	2025	LYBRAND, BENJAMIN ROBERT T & LYBRAND, LINDA SUE HAIG	9/30/2025	Value	58,600	1,600	(57,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	443.07	12.10	(430.97)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	443.07	12.10	(430.97)	0.00	
2025000690	09057044 80	RE	2025	LYBRAND, BENJAMIN ROBERT T & LYBRAND, LINDA SUE HAIG	9/15/2025	Value	59,100	0	(59,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	446.86	0.00	(446.86)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	446.86	0.00	(446.86)	0.00	
2025000661	09087004	RE	2025	B & C LAND HOLDINGS LLC	9/15/2025	Value	2,009,300	1,300,000	(709,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	10,169.07	6,579.30	(3,589.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10,169.07	6,579.30	(3,589.77)	0.00	
2025000728	09090015A	RE	2025	GUNTHER, SHERESE M TRUSTEE & GUNTHER, GREGORY S TRUS	9/16/2025	Value	666,800	530,700	(136,100)		EXCLUSION STATUS CHANGE
Public Notes:						Tax	3,374.67	2,685.87	(688.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,374.67	2,685.87	(688.80)	0.00	
2025000878	09105034	RE	2025	PROVOST, WILLIAM GEORGE	9/29/2025	Value	565,000	464,300	(100,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,939.23	4,058.91	(880.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,939.23	4,058.91	(880.32)	0.00	

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2025000881	09105051	RE	2025	KOOMEN, STEPHANIE & KOOMEN, BRIAN	9/29/2025	Value	701,400	565,600	(135,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	6,131.64	4,944.48	(1,187.16)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,131.64	4,944.48	(1,187.16)	0.00	
2025000884	09105083	RE	2025	SCHMIDT, MICHAEL WAYNE	9/29/2025	Value	420,100	400,000	(20,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,672.51	3,496.80	(175.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,672.51	3,496.80	(175.71)	0.00	
2025000930	09128014N	RE	2025	CRUMP, MARCIE EUDY	9/30/2025	Value	50,100	16,700	(33,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	239.58	79.86	(159.72)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	239.58	79.86	(159.72)	159.72	
2025000741	09137074M	RE	2025	CUTHBERTSON, PAMELA S & CUTHBERTSON, GLENN DAVI	9/17/2025	Value	1,166,700	1,150,000	(16,700)		CHANGE VALUE PER BER
Public Notes:						Tax	5,929.17	5,844.30	(84.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,929.17	5,844.30	(84.87)	0.00	
2025000662	09149061	RE	2025	WALK UP PARTNERS LLC	9/15/2025	Value	543,800	389,400	(154,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,753.90	3,404.13	(1,349.77)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,753.90	3,404.13	(1,349.77)	0.00	
2025000551	09162016	RE	2025	BAUCOM WILLIAM ROGER AND J	9/11/2025	Value	681,000	618,900	(62,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,953.30	5,410.42	(542.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,953.30	5,410.42	(542.88)	0.00	

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2025000493	09192067	RE	2025	ARGUETA, ERICK HERNANDEZ	9/10/2025	Value	388,600	331,600	(57,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,397.14	2,898.85	(498.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,397.14	2,898.85	(498.29)	0.00	
2025000494	09194106	RE	2025	MYERS, LUCRETIA KATHRYN GR & MYERS, JOEL	9/10/2025	Value	535,300	468,200	(67,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,679.59	4,093.00	(586.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,679.59	4,093.00	(586.59)	0.00	
2025000627	09195085	RE	2025	ONE STOP RENOVATIONS LLC	9/12/2025	Value	226,300	160,100	(66,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,978.31	1,399.59	(578.72)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,978.31	1,399.59	(578.72)	0.00	
2025000543	09204022	RE	2025	STRAUSBAUGH, THOMAS JAMES & STRAUSBAUGH, JESSELE	9/11/2025	Value	505,500	458,900	(46,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,282.33	2,071.93	(210.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,282.33	2,071.93	(210.40)	0.00	
2025000604	09204028	RE	2025	CLEWELL, THOMAS M & CLEWELL, DANIELLE C	9/12/2025	Value	555,900	434,300	(121,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,509.89	1,960.86	(549.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,509.89	1,960.86	(549.03)	0.00	
2025000663	09210010W	RE	2025	HAYES, KEVIN J JR & HAYES, SYDNEY	9/15/2025	Value	145,000	108,700	(36,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	736.89	552.41	(184.48)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	736.89	552.41	(184.48)	0.00	

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2025000431	09223043D	RE	2025	D K PROPERTIES OF UNION LL	9/5/2025	Value	197,800	194,200	(3,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,729.17	1,697.70	(31.47)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,729.17	1,697.70	(31.47)	0.00	
2025000432	09223043F	RE	2025	D K PROPERTIES OF UNION LL	9/5/2025	Value	196,500	186,900	(9,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,717.80	1,633.88	(83.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,717.80	1,633.88	(83.92)	0.00	
2025000434	09226110A	RE	2025	HERRIN, DANA KIRT & HERRIN, GERALDINE GLOVE	9/5/2025	Value	157,000	120,200	(36,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,372.49	1,050.79	(321.70)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,372.49	1,050.79	(321.70)	0.00	
2025000490	09228170	RE	2025	MASSEY, MICHAEL SCOTT TRUS & MASSEY, RACHEL BRYANT T	9/10/2025	Value	158,200	103,000	(55,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,382.98	900.43	(482.55)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,382.98	900.43	(482.55)	0.00	
2025000618	09229131	RE	2025	STELCO PROPERTIES LLC	9/12/2025	Value	2,173,600	1,784,000	(389,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	19,001.61	15,595.73	(3,405.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	19,001.61	15,595.73	(3,405.88)	0.00	
2025000491	09231064	RE	2025	SALINA/POMONKEY NORTH CARO	9/10/2025	Value	368,800	347,200	(21,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,224.05	3,035.22	(188.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,224.05	3,035.22	(188.83)	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000866	09232048	RE	2025	SECREST BUILDING LLC	9/29/2025	Value	1,508,500	1,097,900	(410,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	15,600.91	11,354.48	(4,246.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15,600.91	11,354.48	(4,246.43)	0.00	
2025000867	09232066	RE	2025	GIBSON, WALTER H JR & GIBSON, FLORIE M	9/29/2025	Value	318,900	113,500	(205,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,298.06	1,173.82	(2,124.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,298.06	1,173.82	(2,124.24)	0.00	
2025000492	09232139A	RE	2025	LOFFER, LYDIA SMITH & LOFFER, WARREN CALEB	9/10/2025	Value	464,200	454,700	(9,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,058.04	3,974.99	(83.05)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,058.04	3,974.99	(83.05)	0.00	
2025000542	09247004	RE	2025	KANIA, LISA L	9/11/2025	Value	389,300	349,100	(40,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,757.69	1,576.19	(181.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,757.69	1,576.19	(181.50)	0.00	
2025000426	09247035	RE	2025	PRICE, WILLIAM D JR & PRICE, SYLVIA V	9/5/2025	Value	636,400	598,900	(37,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,873.35	2,704.03	(169.32)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,873.35	2,704.03	(169.32)	0.00	
2025000428	09253083	RE	2025	GAGNE, JEFFREY LYNN II	9/5/2025	Value	439,500	421,600	(17,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,126.30	2,039.70	(86.60)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,126.30	2,039.70	(86.60)	0.00	

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2025000429	09270028D	RE	2025	MOHEDANO, RAUL C	9/5/2025	Value	423,000	364,400	(58,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,697.87	3,185.58	(512.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,697.87	3,185.58	(512.29)	0.00	
2025000541	09279024	RE	2025	ROLLINS, KIMBERLY H & ROLLINS, JAMES C	9/11/2025	Value	456,400	364,000	(92,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,989.85	3,182.09	(807.76)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,989.85	3,182.09	(807.76)	0.00	
2025000540	09279053	RE	2025	VILAS, ELLEN E & VILAS, RON D	9/11/2025	Value	484,400	427,000	(57,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,234.62	3,732.83	(501.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,234.62	3,732.83	(501.79)	249.23	
2025000535	09279101	RE	2025	STEGALL, OLIVIA T & STEGALL, JAMES W	9/11/2025	Value	393,100	379,800	(13,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,436.48	3,320.21	(116.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,436.48	3,320.21	(116.27)	0.00	
2025000536	09279125	RE	2025	RYMANOWSKI, BARBARA	9/11/2025	Value	363,500	326,400	(37,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,177.72	2,853.39	(324.33)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,177.72	2,853.39	(324.33)	0.00	
2025000537	09286018	RE	2025	ROONEY, BARBARA & RICHARDS, JAMES J	9/11/2025	Value	632,400	593,900	(38,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,528.44	5,191.87	(336.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,528.44	5,191.87	(336.57)	0.00	

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2025000538	09286072	RE	2025	HOLLINGER, MERRICK D & PIERNO, JOSEPH M	9/11/2025	Value	315,100	269,200	(45,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,754.60	2,353.35	(401.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,754.60	2,353.35	(401.25)	0.00	
2025000605	09292007B	RE	2025	PLYLER, DWIGHT DAVID & PLYLER, DALE ANN	9/12/2025	Value	152,100	114,000	(38,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	686.73	514.71	(172.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	686.73	514.71	(172.02)	0.00	
2025000539	09292042	RE	2025	PEREIRA, RONALD M & PEREIRA, KARIN	9/11/2025	Value	389,700	333,300	(56,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,759.50	1,504.85	(254.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,759.50	1,504.85	(254.65)	0.00	
2025000469	09295010A	RE	2025	BURGESS, JAMES C & BURGESS, QUN	9/9/2025	Value	506,500	438,900	(67,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,427.82	3,836.86	(590.96)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,427.82	3,836.86	(590.96)	0.00	
2025000628	09295014	RE	2025	PASYUK, SERGEY	9/12/2025	Value	1,480,200	1,144,600	(335,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	12,939.91	10,006.09	(2,933.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	12,939.91	10,006.09	(2,933.82)	0.00	
2025000739	09298068K	RE	2025	BTR AT SECREST PRICE LLC	9/17/2025	Value	27,511,700	26,320,000	(1,191,700)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	240,507.28	230,089.44	(10,417.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	240,507.28	230,089.44	(10,417.84)	0.00	

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2025000669	09301002E90	RE	2025	TY-PAR REALTY INC	9/15/2025	Value	5,419,800	4,561,100	(858,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	47,379.89	39,873.14	(7,506.75)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	47,379.89	39,873.14	(7,506.75)	0.00	
2025000792	09301061J	RE	2025	TYSON, CARLTON MARK TRUSTE	9/22/2025	Value	2,759,100	2,100,000	(659,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	24,120.05	18,358.20	(5,761.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	24,120.05	18,358.20	(5,761.85)	0.00	
2025000400	09301128	RE	2025	ARROWOOD, JONATHAN	9/5/2025	Value	465,300	339,900	(125,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,067.65	2,971.41	(1,096.24)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,067.65	2,971.41	(1,096.24)	0.00	
2025000411	09301227E	RE	2025	CARVAJAL, JESUS & PEREZ, EDITH	9/5/2025	Value	612,700	477,100	(135,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,356.22	4,170.81	(1,185.41)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,356.22	4,170.81	(1,185.41)	0.00	
2025000932	09301228	RE	2025	GRIFFIN, CHARLES MITCHELL & GRIFFIN, RHONDA L	9/30/2025	Value	136,700	37,500	(99,200)		CHANGE VALUE PER BER
Public Notes:						Tax	1,195.03	327.83	(867.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,195.03	327.83	(867.20)	0.00	
2025000466	09301262	RE	2025	DOAN, GEORGE WILLIAM & DOAN, CHERYL TRULL	9/9/2025	Value	447,300	399,600	(47,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,910.30	3,493.30	(417.00)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,910.30	3,493.30	(417.00)	0.00	

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2025000385	09301267	RE	2025	2017-1 IH BORROWER LP	9/4/2025	Value	569,700	466,700	(103,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,980.32	4,079.89	(900.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,980.32	4,079.89	(900.43)	0.00	
2025000422	09301273	RE	2025	ASFAW, HANNA G & TAMENE, KENNEDY	9/5/2025	Value	475,800	436,900	(38,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,159.44	3,819.38	(340.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,159.44	3,819.38	(340.06)	0.00	
2025000423	09307097	RE	2025	HEWIT, TARA & HEWIT, CASEY	9/5/2025	Value	463,900	396,600	(67,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,055.41	3,467.08	(588.33)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,055.41	3,467.08	(588.33)	0.00	
2025000425	09307099	RE	2025	KIRCHNER, STEVEN & KITCHNER, CARLA	9/5/2025	Value	513,800	439,300	(74,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,491.64	3,840.36	(651.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,491.64	3,840.36	(651.28)	0.00	
2025000630	09316001	RE	2025	HOWARD, EMMA P	9/12/2025	Value	292,564	226,664	(65,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,415.43	1,096.60	(318.83)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,415.43	1,096.60	(318.83)	0.00	
2025000534	09321009A80	RE	2025	BRETZ, RONALD D TRUSTEE & BRETZ, NAN E TRUSTEE	9/11/2025	Value	578,700	387,800	(190,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,059.00	3,390.15	(1,668.85)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,059.00	3,390.15	(1,668.85)	828.89	

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2025000451	09321015	RE	2025	BROWNING, HENRY BAXTER	9/8/2025	Value	280,100	189,100	(91,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,348.96	910.71	(438.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,348.96	910.71	(438.25)	0.00	
2025000715	09321314	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	391,700	359,600	(32,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,424.24	3,143.62	(280.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,424.24	3,143.62	(280.62)	0.00	
2025000419	09321326	RE	2025	TARASEVICH, VERA & TARASEVICH, MICHAEL	9/5/2025	Value	418,200	358,700	(59,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,655.90	3,135.76	(520.14)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,655.90	3,135.76	(520.14)	0.00	
2025000714	09321448	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	438,200	403,300	(34,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,830.74	3,525.65	(305.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,830.74	3,525.65	(305.09)	0.00	
2025000420	09327005E	RE	2025	DONEL, KAREN & DONEL, JASON	9/5/2025	Value	364,500	350,100	(14,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,755.43	1,686.08	(69.35)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,755.43	1,686.08	(69.35)	0.00	
2025000533	09327009	RE	2025	KREJCHA, ERIC & KREJCHA, SHLAKIA	9/11/2025	Value	511,300	456,400	(54,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,308.52	2,060.65	(247.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,308.52	2,060.65	(247.87)	0.00	

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2025000916	09327010E	RE	2025	HONEYCUTT, LINDA JANE W	9/30/2025	Value	55,100	26,600	(28,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	265.36	128.11	(137.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	265.36	128.11	(137.25)	0.00	
2025000399	09327161	RE	2025	HELMS, ALLISON	9/5/2025	Value	366,200	286,800	(79,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,763.62	1,381.23	(382.39)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,763.62	1,381.23	(382.39)	0.00	
2025000414	09336260	RE	2025	GRONDIN, CLAIRE R & GRONDIN, RONALD L	9/5/2025	Value	513,400	475,700	(37,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,488.14	4,158.57	(329.57)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,488.14	4,158.57	(329.57)	0.00	
2025000660	09336442	RE	2025	FRANKLIN, ANGELA D & FRANKLIN, ERIC J	9/15/2025	Value	359,200	274,300	(84,900)		CHANGE VALUE PER BER
Public Notes:						Tax	3,140.13	2,397.93	(742.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,140.13	2,397.93	(742.20)	0.00	
2025000394	09339002	RE	2025	JM&L COMPANY LLC	9/4/2025	Value	388,400	222,500	(165,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,395.39	1,945.10	(1,450.29)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,395.39	1,945.10	(1,450.29)	0.00	
2025000415	09339046	RE	2025	WHISNANT, HARRISON S	9/5/2025	Value	340,800	276,300	(64,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,979.27	2,415.41	(563.86)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,979.27	2,415.41	(563.86)	0.00	

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2025000416	09339061	RE	2025	HELMS, RUTH H	9/5/2025	Value	417,800	380,000	(37,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,652.41	3,321.96	(330.45)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,652.41	3,321.96	(330.45)	0.00	
2025000418	09342115	RE	2025	SURRATT, JOHN S & SURRATT, BOBBY C	9/5/2025	Value	296,200	229,100	(67,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,589.38	2,002.79	(586.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,589.38	2,002.79	(586.59)	0.00	
2025000410	09345005	RE	2025	PRESSLEY, WAYNE A HEIRS	9/5/2025	Value	450,300	287,200	(163,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,178.55	1,389.47	(789.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,178.55	1,389.47	(789.08)	0.00	
2025000532	09345005B	RE	2025	GRIFFIN, JOAN PRESSLEY	9/11/2025	Value	165,000	132,500	(32,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	798.27	641.04	(157.23)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	798.27	641.04	(157.23)	0.00	
2025000401	09345361	RE	2025	WILLIAMS, FEDDER REAN	9/5/2025	Value	430,000	420,600	(9,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,759.06	3,676.89	(82.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,759.06	3,676.89	(82.17)	0.00	
2025000398	09345373	RE	2025	WISSINGER, MICHAEL & DUNNIGAN, KANDICE	9/5/2025	Value	371,800	366,600	(5,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,250.28	3,204.82	(45.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,250.28	3,204.82	(45.46)	0.00	

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2025000531	09351008A	RE	2025	REA, CHERIE A	9/11/2025	Value	282,200	258,200	(24,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,359.08	1,243.49	(115.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,359.08	1,243.49	(115.59)	0.00	
2025000529	09351025	RE	2025	HOLMBERG, THERESA & HOLMBERG, ERIC C	9/11/2025	Value	328,900	290,700	(38,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,583.98	1,400.01	(183.97)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,583.98	1,400.01	(183.97)	0.00	
2025000530	09351525	RE	2025	HILL-JONES, VALERIE MICHEL & JONES, FLOYD	9/11/2025	Value	485,800	471,100	(14,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	4,246.86	4,118.36	(128.50)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,246.86	4,118.36	(128.50)	0.00	
2025000397	09354064	RE	2025	PURVIS, JASON RICHARD & SHANK-PURVIS, HEATHER M	9/5/2025	Value	448,800	413,700	(35,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,161.42	1,992.38	(169.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,161.42	1,992.38	(169.04)	0.00	
2025000392	09372020	RE	2025	TYSON, JANET F	9/4/2025	Value	614,200	519,900	(94,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,971.50	2,515.28	(456.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,971.50	2,515.28	(456.22)	0.00	
2025000621	09372043B	RE	2025	MILLER, MICHAEL ALEXANDER	9/12/2025	Value	634,200	516,600	(117,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	3,068.26	2,499.31	(568.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,068.26	2,499.31	(568.95)	0.00	

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2025000740	09375040	RE	2025	WOLFE, JANET ROBB & WOLFE, LELAND MACK	9/17/2025	Value	226,900	172,900	(54,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,097.74	836.49	(261.25)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,097.74	836.49	(261.25)	0.00	
2025000393	09375069	RE	2025	BROOKS, DANNY PARNELL	9/4/2025	Value	47,400	31,800	(15,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	229.32	153.85	(75.47)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	229.32	153.85	(75.47)	0.00	
2025000606	09387016	RE	2025	BLUM, MINDY RENEE & BLUM, PATRICK ORWELL	9/12/2025	Value	1,084,200	959,400	(124,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	5,221.51	4,620.47	(601.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,221.51	4,620.47	(601.04)	0.00	
2025000711	09396822	RE	2025	AMH 2015-1 BORROWER LLC	9/15/2025	Value	421,400	390,500	(30,900)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,755.11	2,553.09	(202.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,755.11	2,553.09	(202.02)	0.00	
2025000707	09396899	RE	2025	AMH 2015-2 BORROWER LP	9/15/2025	Value	446,300	413,300	(33,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,159.20	1,999.55	(159.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,159.20	1,999.55	(159.65)	0.00	
2025000719	09396989	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	458,000	419,500	(38,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,215.80	2,029.54	(186.26)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,215.80	2,029.54	(186.26)	0.00	

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2025000705	09397020	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	449,500	431,500	(18,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,174.68	2,087.60	(87.08)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,174.68	2,087.60	(87.08)	0.00	
2025000706	09397049	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	446,400	423,000	(23,400)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,159.68	2,046.47	(113.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,159.68	2,046.47	(113.21)	0.00	
2025000717	09397092	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	470,700	422,600	(48,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,277.25	2,044.54	(232.71)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,277.25	2,044.54	(232.71)	0.00	
2025000933	09397187	RE	2025	SIMS-WIGGINS, LINDA & SIMS, DONALD	9/30/2025	Value	420,500	393,000	(27,500)		CHANGE VALUE PER BER
Public Notes:						Tax	2,749.23	2,569.43	(179.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,749.23	2,569.43	(179.80)	0.00	
2025000718	09399039	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	409,100	390,000	(19,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,674.70	2,549.82	(124.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,674.70	2,549.82	(124.88)	0.00	
2025000702	09402181	RE	2025	AMH 2015-2 BORROWER LP	9/15/2025	Value	399,200	364,900	(34,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,931.33	1,765.39	(165.94)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,931.33	1,765.39	(165.94)	0.00	

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2025000712	09402237	RE	2025	AMH 2015-2 BORROWER LLC	9/15/2025	Value	421,600	384,600	(37,000)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,039.70	1,860.69	(179.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,039.70	1,860.69	(179.01)	0.00	
2025000713	09402521	RE	2025	SFR 2014-NC LLC	9/15/2025	Value	389,600	373,100	(16,500)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,884.88	1,805.06	(79.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,884.88	1,805.06	(79.82)	0.00	
2025000709	09402527	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	401,300	366,600	(34,700)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,941.49	1,773.61	(167.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,941.49	1,773.61	(167.88)	0.00	
2025000703	09402547	RE	2025	AMH 2014-3 BORROWER LLC	9/15/2025	Value	405,300	373,700	(31,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,960.84	1,807.96	(152.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,960.84	1,807.96	(152.88)	0.00	
2025000716	09402554	RE	2025	AMH 2015-2 BORROWER LLC	9/15/2025	Value	397,400	372,800	(24,600)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,922.62	1,803.61	(119.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,922.62	1,803.61	(119.01)	0.00	
2025000710	09402572	RE	2025	AMH NC PROPERTIES LP	9/15/2025	Value	381,300	367,000	(14,300)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,844.73	1,775.55	(69.18)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,844.73	1,775.55	(69.18)	0.00	

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2025000704	09402669	RE	2025	AMH 2014-2 BORROWER LLC	9/15/2025	Value	384,500	361,700	(22,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,860.21	1,749.90	(110.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,860.21	1,749.90	(110.31)	0.00	
2025000517	09402711	RE	2025	BULOS, MONICA C	9/11/2025	Value	314,400	312,200	(2,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,521.07	1,510.42	(10.65)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,521.07	1,510.42	(10.65)	0.00	
2025000622	09402785	RE	2025	MARSIAN, RANDALL HILL	9/12/2025	Value	448,100	412,300	(35,800)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	2,167.91	1,994.71	(173.20)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,167.91	1,994.71	(173.20)	0.00	
2025000708	09402861	RE	2025	AMH 2015-1 BORROWER LP	9/15/2025	Value	367,100	354,900	(12,200)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						Tax	1,776.03	1,717.01	(59.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,776.03	1,717.01	(59.02)	0.00	
2025000768	322638	PP	2025	COX, VANCE CLINTON	9/18/2025	Value	3,101	0	(3,101)		TAXPAYER MOVED
Public Notes:						Tax	27.11	0.00	(27.11)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	27.11	0.00	(27.11)	0.00	
2025000763	328576	PP	2025	EARNHARDT, JOHN RAY JR	9/18/2025	Value	5,548	2,842	(2,706)		SOLD PP ASSET
Public Notes:						Tax	28.33	14.51	(13.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	28.33	14.51	(13.82)	0.00	

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2025000810	365517	PP	2025	MILLS, REID WALKER	9/24/2025	Value	14,716	2,662	(12,054)		SOLD PP ASSET
Public Notes:						Tax	70.67	12.78	(57.89)		
						LL	7.07	1.27	(5.80)		
						INT	0.00	0.00	0.00		
						Tax TTL	77.74	14.05	(63.69)	0.00	
2025000751	382681	PP	2025	ROWELL, MITCHELL LAMAR	9/17/2025	Value	63,415	9,885	(53,530)		SOLD PP ASSET
Public Notes:						Tax	554.37	86.41	(467.96)		
						LL	55.44	8.64	(46.80)		
						INT	0.00	0.00	0.00		
						Tax TTL	609.81	95.05	(514.76)	0.00	
2025000347	383195	PP	2025	RUSHING, SYLVIA & RUSHING, RALPH LEE	9/2/2025	Value	11,077	300	(10,777)		DUPLICATE ASSESSMENT
Public Notes:						Tax	52.83	1.43	(51.40)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	52.83	1.43	(51.40)	51.40	
2025000837	389570	PP	2025	SPARKMAN, LAURA JEAN	9/25/2025	Value	3,691	0	(3,691)		TAX CODE CHANGE
Public Notes:						Tax	32.27	0.00	(32.27)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	32.27	0.00	(32.27)	0.00	
2025000819	407139	PP	2025	STEGALL, ANDREW DICKSON	9/25/2025	Value	269,010	266,468	(2,542)		SOLD PP ASSET
Public Notes:						Tax	1,359.85	1,347.00	(12.85)		
						LL	135.99	134.72	(1.27)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,495.84	1,481.72	(14.12)	0.00	
2025000756	407579	PP	2025	BECKMAN COULTER INC	9/17/2025	Value	1,797,592	1,481,088	(316,504)		CLERICAL ERROR
Public Notes:						Tax	15,714.55	12,947.67	(2,766.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15,714.55	12,947.67	(2,766.88)	0.00	

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2025000754	407660	PP	2025	BIG LOTS STORES INC #5119	9/17/2025	Value	162,509	162,509	0		LATE LIST
Public Notes:						Tax	1,420.65	1,420.65	0.00		PENALTY CHANGE
						LL	142.07	0.00	(142.07)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,562.72	1,420.65	(142.07)	0.00	
2025000831	409725	PP	2025	EVER KLEEN INC	9/25/2025	Value	3,464	0	(3,464)		DUPLICATE
Public Notes:						Tax	17.51	0.00	(17.51)		ASSESSMENT
						LL	1.75	0.00	(1.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	19.26	0.00	(19.26)	19.26	
2025000852	409906	PP	2025	AP & RP LLC	9/29/2025	Value	27,761	0	(27,761)		SOLD PP ASSET
Public Notes:						Tax	179.59	0.00	(179.59)		
						LL	17.96	0.00	(17.96)		
						INT	0.00	0.00	0.00		
						Tax TTL	197.55	0.00	(197.55)	0.00	
2025000783	410201	PP	2025	GERALD MANESS CONCRETE CO	9/18/2025	Value	14,347	0	(14,347)		BUSINESS CLOSED
Public Notes:						Tax	73.27	0.00	(73.27)		
						LL	7.33	0.00	(7.33)		
						INT	0.00	0.00	0.00		
						Tax TTL	80.60	0.00	(80.60)	0.00	
2025000783	410201	PP	2024	GERALD MANESS CONCRETE CO	9/18/2025	Value	17,678	0	(17,678)		BUSINESS CLOSED
Public Notes:						Tax	118.18	0.00	(118.18)		
						LL	11.82	0.00	(11.82)		
						INT	0.00	0.00	0.00		
						Tax TTL	130.00	0.00	(130.00)	130.00	
2025000796	410907	PP	2025	HYG FINANCIAL SERVICES INC	9/23/2025	Value	1,764,101	1,756,886	(7,215)		CLERICAL ERROR
Public Notes:						Tax	15,421.77	15,358.70	(63.07)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	15,421.77	15,358.70	(63.07)	0.00	

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2025000586	411757	PP	2025	LEGACY LANDSCAPING INC	9/12/2025	Value	1,073,692	1,073,692	0		LATE LIST
Public Notes:						Tax	6,945.71	6,945.71	0.00		PENALTY CHANGE
						LL	694.57	0.00	(694.57)		
						INT	0.00	0.00	0.00		
						Tax TTL	7,640.28	6,945.71	(694.57)	0.00	
2025000390	411956	PP	2025	NGUYEN, BICH LOAN	9/4/2025	Value	22,326	0	(22,326)		SOLD PP ASSET
Public Notes:						Tax	195.17	0.00	(195.17)		
						LL	19.52	0.00	(19.52)		
						INT	0.00	0.00	0.00		
						Tax TTL	214.69	0.00	(214.69)	0.00	
2025000524	412254	PP	2025	MC GEE CORP	9/11/2025	Value	9,457,290	9,457,290	0		LATE LIST
Public Notes:						Tax	63,307.10	63,307.10	0.00		PENALTY CHANGE
						LL	6,330.71	0.00	(6,330.71)		
						INT	0.00	0.00	0.00		
						Tax TTL	69,637.81	63,307.10	(6,330.71)	0.00	
2025000809	413216	PP	2025	PENSKE TRUCK LEASING CO LP	9/24/2025	Value	4,598,342	4,530,224	(68,118)		CLERICAL ERROR
Public Notes:						Tax	29,907.62	29,464.58	(443.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	29,907.62	29,464.58	(443.04)	0.00	
2025000820	413850	PP	2025	LUSSIER, JEFFREY	9/25/2025	Value	2,833	0	(2,833)		BUSINESS CLOSED
Public Notes:						Tax	18.33	0.00	(18.33)		
						LL	1.83	0.00	(1.83)		
						INT	0.00	0.00	0.00		
						Tax TTL	20.16	0.00	(20.16)	0.00	
2025000820	413850	PP	2024	LUSSIER, JEFFREY	9/25/2025	Value	2,833	0	(2,833)		BUSINESS CLOSED
Public Notes:						Tax	23.35	0.00	(23.35)		
						LL	2.34	0.00	(2.34)		
						INT	0.00	0.00	0.00		
						Tax TTL	25.69	0.00	(25.69)	0.00	

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2025000808	414108	PP	2025	NEW RUE21 LLC STORE #1394	9/24/2025	Value	79,623	0	(79,623)		BUSINESS CLOSED
Public Notes:						Tax	696.06	0.00	(696.06)		
						LL	69.61	0.00	(69.61)		
						INT	0.00	0.00	0.00		
						Tax TTL	765.67	0.00	(765.67)	0.00	
2025000812	414167	PP	2025	S & S RETAINING WALLS INC	9/24/2025	Value	201,039	174,480	(26,559)		SOLD PP ASSET
Public Notes:						Tax	965.39	837.85	(127.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	965.39	837.85	(127.54)	0.00	
2025000818	414281	PP	2025	SECREST RIGGING & MACHINER	9/25/2025	Value	74,790	72,290	(2,500)		SOLD PP ASSET
Public Notes:						Tax	653.81	631.96	(21.85)		
						LL	65.38	63.21	(2.17)		
						INT	0.00	0.00	0.00		
						Tax TTL	719.19	695.17	(24.02)	0.00	
2025000817	414282	PP	2025	SECREST WRECKER SERVICE IN	9/25/2025	Value	239,576	238,076	(1,500)		SOLD PP ASSET
Public Notes:						Tax	1,169.61	1,169.61	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,169.61	1,169.61	0.00	0.00	
2025000371	415013	PP	2025	TARGET CORPORATION #2074	9/3/2025	Value	800,479	800,479	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	6,997.79	6,997.79	0.00		
						LL	699.78	0.00	(699.78)		
						INT	0.00	0.00	0.00		
						Tax TTL	7,697.57	6,997.79	(699.78)	0.00	
2025000372	415014	PP	2025	TARGET CORPORATION #2395	9/3/2025	Value	2,878,512	2,878,512	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	14,021.23	14,021.23	0.00		
						LL	1,402.12	0.00	(1,402.12)		
						INT	0.00	0.00	0.00		
						Tax TTL	15,423.35	14,021.23	(1,402.12)	0.00	

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2025000584	577912	PP	2025	BREAKING GROUNDS COFFEE CO	9/12/2025	Value	1,300	0	(1,300)		CLERICAL ERROR
Public Notes:						Tax	10.01	0.00	(10.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10.01	0.00	(10.01)	0.00	
2025000753	578641	PP	2025	MORRISON, CHRISTIE FUSSELL	9/17/2025	Value	7,098	0	(7,098)		SOLD PP ASSET
Public Notes:						Tax	34.18	0.00	(34.18)		
						LL	3.42	0.00	(3.42)		
						INT	0.00	0.00	0.00		
						Tax TTL	37.60	0.00	(37.60)	0.00	
2025000753	578641	PP	2024	MORRISON, CHRISTIE FUSSELL	9/17/2025	Value	7,471	0	(7,471)		SOLD PP ASSET
Public Notes:						Tax	48.05	0.00	(48.05)		
						LL	4.81	0.00	(4.81)		
						INT	0.00	0.00	0.00		
						Tax TTL	52.86	0.00	(52.86)	0.00	
2025000753	578641	PP	2023	MORRISON, CHRISTIE FUSSELL	9/17/2025	Value	7,865	0	(7,865)		SOLD PP ASSET
Public Notes:						Tax	49.90	0.00	(49.90)		
						LL	4.99	0.00	(4.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	54.89	0.00	(54.89)	56.40	
2025000359	584732	PP	2025	DUKE, AARON HAHN	9/2/2025	Value	15,303	4,287	(11,016)		SOLD PP ASSET
Public Notes:						Tax	77.45	21.70	(55.75)		
						LL	7.75	2.17	(5.58)		
						INT	0.00	0.00	0.00		
						Tax TTL	85.20	23.87	(61.33)	0.00	
2025000769	584831	PP	2025	ALLEN BROKERAGE SERVICES,	9/18/2025	Value	2,484	0	(2,484)		BUSINESS CLOSED
Public Notes:						Tax	11.96	0.00	(11.96)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	11.96	0.00	(11.96)	0.00	

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2025000829	584863	PP	2025	BEVIN K MALLEY DDS PA II	9/25/2025	Value	459,542	0	(459,542)		BUSINESS CLOSED
Public Notes:						Tax	2,135.03	0.00	(2,135.03)		
						LL	213.50	0.00	(213.50)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,348.53	0.00	(2,348.53)	0.00	
2025000349	598668	PP	2025	GUTIERREZ HERNANDEZ, VIANE	9/2/2025	Value	2,018	857	(1,161)		SOLD PP ASSET
Public Notes:						Tax	13.19	5.60	(7.59)		
						LL	1.32	0.56	(0.76)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.51	6.16	(8.35)	0.00	
2025000349	598668	PP	2024	GUTIERREZ HERNANDEZ, VIANE	9/2/2025	Value	2,125	903	(1,222)		SOLD PP ASSET
Public Notes:						Tax	17.78	7.56	(10.22)		
						LL	1.78	0.76	(1.02)		
						INT	0.00	0.00	0.00		
						Tax TTL	19.56	8.32	(11.24)	0.00	
2025000370	615770	PP	2025	BANK OF MONTREAL EQUIPMENT	9/3/2025	Value	126,362	126,362	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	639.52	639.52	0.00		
						LL	63.95	0.00	(63.95)		
						INT	0.00	0.00	0.00		
						Tax TTL	703.47	639.52	(63.95)	0.00	
2025000348	620708	PP	2025	CELMER, ROBERT ANDREW III	9/2/2025	Value	3,281	0	(3,281)		SOLD PP ASSET
Public Notes:						Tax	28.68	0.00	(28.68)		
						LL	2.87	0.00	(2.87)		
						INT	0.00	0.00	0.00		
						Tax TTL	31.55	0.00	(31.55)	0.00	
2025000348	620708	PP	2024	CELMER, ROBERT ANDREW III	9/2/2025	Value	3,645	0	(3,645)		SOLD PP ASSET
Public Notes:						Tax	39.75	0.00	(39.75)		
						LL	3.98	0.00	(3.98)		
						INT	0.00	0.00	0.00		
						Tax TTL	43.73	0.00	(43.73)	0.00	

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2025000583	624460	PP	2025	ATM USA LLC	9/12/2025	Value	1,203	0	(1,203)		CLERICAL ERROR
Public Notes:						Tax	10.52	0.00	(10.52)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10.52	0.00	(10.52)	0.00	
2025000350	625168	PP	2025	WEST HILL RANCH GROUP LLC	9/2/2025	Value	58,854	0	(58,854)		DUPLICATE ASSESSMENT
Public Notes:						Tax	384.79	0.00	(384.79)		
						LL	38.48	0.00	(38.48)		
						INT	0.00	0.00	0.00		
						Tax TTL	423.27	0.00	(423.27)	0.00	
2025000585	625520	PP	2025	CARPENTER, ADAM	9/12/2025	Value	13,600	0	(13,600)		BUSINESS CLOSED
Public Notes:						Tax	88.45	0.00	(88.45)		
						LL	8.85	0.00	(8.85)		
						INT	0.00	0.00	0.00		
						Tax TTL	97.30	0.00	(97.30)	0.00	
2025000585	625520	PP	2024	CARPENTER, ADAM	9/12/2025	Value	13,600	0	(13,600)		BUSINESS CLOSED
Public Notes:						Tax	112.40	0.00	(112.40)		
						LL	11.24	0.00	(11.24)		
						INT	0.00	0.00	0.00		
						Tax TTL	123.64	0.00	(123.64)	0.00	
2025000378	625682	PP	2025	WHITLEY, JOSEPH WESLEY	9/3/2025	Value	96,457	0	(96,457)		TAXPAYER MOVED
Public Notes:						Tax	492.61	0.00	(492.61)		
						LL	49.26	0.00	(49.26)		
						INT	0.00	0.00	0.00		
						Tax TTL	541.87	0.00	(541.87)	0.00	
2025000822	640886	PP	2025	VRG COMPONENTS INC	9/25/2025	Value	36,074	0	(36,074)		TAXPAYER MOVED
Public Notes:						Tax	233.36	0.00	(233.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	233.36	0.00	(233.36)	0.00	

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2025000825	644791	PP	2025	MCATEER TOWING SERVICES LL	9/25/2025	Value	33,419	0	(33,419)		CLERICAL ERROR
Public Notes:						Tax	169.84	0.00	(169.84)		
						LL	16.98	0.00	(16.98)		
						INT	0.00	0.00	0.00		
						Tax TTL	186.82	0.00	(186.82)	0.00	
2025000805	644961	PP	2025	RHOADS, DAPHNIE BEAR & RHOADS, JACOB KEITH	9/24/2025	Value	25,988	0	(25,988)		CLERICAL ERROR
Public Notes:						Tax	169.91	0.00	(169.91)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	169.91	0.00	(169.91)	0.00	
2025000821	646080	PP	2025	GARCIA, ANA	9/25/2025	Value	37,635	0	(37,635)		DUPLICATE ASSESSMENT
Public Notes:						Tax	329.01	0.00	(329.01)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	329.01	0.00	(329.01)	0.00	
2025000853	646357	PP	2025	KIKER, KAREN M	9/29/2025	Value	24,368	0	(24,368)		TAXPAYER MOVED
Public Notes:						Tax	123.84	0.00	(123.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	123.84	0.00	(123.84)	0.00	
2025000766	646374	PP	2025	COOK, HOLLY VANDERBEEK	9/18/2025	Value	144,504	0	(144,504)		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						Tax	695.93	0.00	(695.93)		
						LL	69.59	0.00	(69.59)		
						INT	0.00	0.00	0.00		
						Tax TTL	765.52	0.00	(765.52)	0.00	
2025000761	647207	PP	2025	NOVANT HEALTH GO HEALTH UR	9/17/2025	Value	914,685	505,264	(409,421)		DUPLICATE ASSESSMENT
Public Notes:						Tax	4,249.63	2,347.46	(1,902.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,249.63	2,347.46	(1,902.17)	0.00	

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2025000579	647208	PP	2025	NOVANT HEALTH GO HEALTH UR	9/12/2025	Value	749,655	437,509	(312,146)		DUPLICATE ASSESSMENT
Public Notes:						Tax	4,901.24	2,860.43	(2,040.81)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,901.24	2,860.43	(2,040.81)	0.00	
2025000828	647849	PP	2025	RLJD ENTERPRISES LLC	9/25/2025	Value	48,600	0	(48,600)		TAXPAYER MOVED
Public Notes:						Tax	314.39	0.00	(314.39)		
						LL	31.44	0.00	(31.44)		
						INT	0.00	0.00	0.00		
						Tax TTL	345.83	0.00	(345.83)	0.00	
2025000762	647878	PP	2025	TASSEW, AFEWORKI EYOB	9/17/2025	Value	10,935	0	(10,935)		TAXPAYER MOVED
Public Notes:						Tax	70.74	0.00	(70.74)		
						LL	7.07	0.00	(7.07)		
						INT	0.00	0.00	0.00		
						Tax TTL	77.81	0.00	(77.81)	0.00	
2025000779	647906	PP	2025	AUXILIOR CAPITAL PARTNERS	9/18/2025	Value	383,350	383,350	0		LATE LIST PENALTY CHANGE
Public Notes:						Tax	2,493.31	2,493.31	0.00		
						LL	249.33	0.00	(249.33)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,742.64	2,493.31	(249.33)	0.00	
2025000351	647931	PP	2025	LINDER INDUSTRIAL MACHINER & DATO, MONICA	9/2/2025	Value	382,930	0	(382,930)		CLERICAL ERROR
Public Notes:						Tax	1,852.62	0.00	(1,852.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,852.62	0.00	(1,852.62)	0.00	
2025000582	647941	PP	2025	AA & RJ LLC	9/12/2025	Value	92,010	0	(92,010)		CLERICAL ERROR
Public Notes:						Tax	595.21	0.00	(595.21)		
						LL	59.52	0.00	(59.52)		
						INT	0.00	0.00	0.00		
						Tax TTL	654.73	0.00	(654.73)	0.00	

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2025000369	648181	PP	2025	BMO BANK N.A	9/3/2025	Value	104,771	104,771	0		LATE LIST
Public Notes:						Tax	681.43	681.43	0.00		PENALTY CHANGE
						LL	68.14	0.00	(68.14)		
						INT	0.00	0.00	0.00		
						Tax TTL	749.57	681.43	(68.14)	0.00	
2025000846	657567	PP	2025	BAKER, JOE EDWARD JR	9/26/2025	Value	48,640	0	(48,640)		TAX CODE
Public Notes:						Tax	316.35	0.00	(316.35)		CHANGE
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	316.35	0.00	(316.35)	233.66	
2025000376	658430	PP	2025	IE EXPRESS INC	9/3/2025	Value	28,890	0	(28,890)		TAXPAYER MOVED
Public Notes:						Tax	252.56	0.00	(252.56)		
						LL	25.26	0.00	(25.26)		
						INT	0.00	0.00	0.00		
						Tax TTL	277.82	0.00	(277.82)	0.00	
2025000830	658590	PP	2025	KINGSBRIDGE HOLDINGS LLC	9/25/2025	Value	1,063,560	1,063,560	0		LATE LIST
Public Notes:						Tax	9,297.64	9,297.64	0.00		PENALTY CHANGE
						LL	929.76	0.00	(929.76)		
						INT	0.00	0.00	0.00		
						Tax TTL	10,227.40	9,297.64	(929.76)	0.00	
2025000514	658594	PP	2025	SCOTT, JENNIFER & SCOTT, JASON T	9/11/2025	Value	55,768	34,696	(21,072)		CHANGE VALUE
Public Notes:						Tax	487.52	303.31	(184.21)		DUE TO AN APPEAL
						LL	48.75	30.33	(18.42)		
						INT	0.00	0.00	0.00		
						Tax TTL	536.27	333.64	(202.63)	0.00	
2025000759	658896	PP	2025	HASTY, JAMES STEWART	9/17/2025	Value	263,549	1,140	(262,409)		CLERICAL ERROR
Public Notes:						Tax	1,315.37	5.69	(1,309.68)		
						LL	131.54	0.57	(130.97)		
						INT	0.00	0.00	0.00		
						Tax TTL	1,446.91	6.26	(1,440.65)	0.00	

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2025000580	660033	PP	2025	PAVANPUTRA 2017 LLC	9/12/2025	Value	48,934	0	(48,934)		CLERICAL ERROR
Public Notes:						Tax	427.78	0.00	(427.78)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	427.78	0.00	(427.78)	0.00	
2025000760	660114	PP	2025	SURTECO NORTH AMERICA INC	9/17/2025	Value	7,702,962	0	(7,702,962)		DUPLICATE ASSESSMENT
Public Notes:						Tax	67,339.29	0.00	(67,339.29)		
						LL	6,733.93	0.00	(6,733.93)		
						INT	0.00	0.00	0.00		
						Tax TTL	74,073.22	0.00	(74,073.22)	0.00	
2025000357	662103	PP	2024	SIPE, ADAM GRAY	9/2/2025	Value	23,730	7,251	(16,479)		TAXPAYER MOVED
Public Notes:						Tax	195.58	59.76	(135.82)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	195.58	59.76	(135.82)	0.00	
2025000594	662974	PP	2024	SHINING LIGHT BAPTIST CHU	9/12/2025	Value	16,160	0	(16,160)		EXEMPTION STATUS CHANGE
Public Notes:						Tax	176.22	0.00	(176.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	176.22	0.00	(176.22)	0.00	
2025000732	663980	PP	2024	BROWN, DARIUS RHASHIN	9/16/2025	Value	27,767	0	(27,767)		TAX CODE CHANGE
Public Notes:						Tax	302.80	0.00	(302.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	302.80	0.00	(302.80)	0.00	
2025000355	665206	PP	2024	AVAKIAN, MAKENNA JOY	9/2/2025	Value	34,998	0	(34,998)		TAXPAYER MOVED
Public Notes:						Tax	225.49	0.00	(225.49)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	225.49	0.00	(225.49)	0.00	

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2025000358	665539	PP	2024	HOUK, ANDREW CHARLES & HUTCHISON, HALI REED	9/2/2025	Value	2,120	0	(2,120)		TAXPAYER MOVED
Public Notes:						Tax	23.12	0.00	(23.12)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	23.12	0.00	(23.12)	0.00	
2025000592	665770	PP	2024	MCGREGOR, JEAN TUCK	9/12/2025	Value	67,950	0	(67,950)		TAXPAYER MOVED
Public Notes:						Tax	426.59	0.00	(426.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	426.59	0.00	(426.59)	0.00	
2025000591	666121	PP	2024	DEVAUGHN, JOSEF RICHARD	9/12/2025	Value	107,123	59,513	(47,610)		DUPLICATE ASSESSMENT
Public Notes:						Tax	699.30	388.50	(310.80)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	699.30	388.50	(310.80)	0.00	
2025000373	666287	PP	2024	HACKWELDER, PAULA MARIE	9/3/2025	Value	30,753	0	(30,753)		TAXPAYER MOVED
Public Notes:						Tax	254.17	0.00	(254.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	254.17	0.00	(254.17)	0.00	
2025000595	666304	PP	2024	MUNN, TREVOR CHRISTOPHER	9/12/2025	Value	113,813	0	(113,813)		TAXPAYER MOVED
Public Notes:						Tax	1,166.92	0.00	(1,166.92)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,166.92	0.00	(1,166.92)	0.00	
2025000354	666393	PP	2024	DENNIS, LAUREN MARIE & DENNIS, JOSEPH PATRICK	9/2/2025	Value	76,854	35,262	(41,592)		TAXPAYER MOVED
Public Notes:						Tax	787.98	361.54	(426.44)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	787.98	361.54	(426.44)	0.00	

Correction Listing Report

Union County

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2025/10/01 10:16:47 AM

Date Posted between 9/1/2025 and 9/30/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000758	666475	PP	2024	SHEEHAN, RICHARD MICHAEL	9/17/2025	Value	4,670	0	(4,670)		SOLD PP ASSET
Public Notes:						Tax	47.88	0.00	(47.88)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	47.88	0.00	(47.88)	0.00	
2025000749	666536	PP	2024	FIJAN, MARIA ROSE	9/17/2025	Value	25,004	0	(25,004)		TAXPAYER MOVED
Public Notes:						Tax	156.30	0.00	(156.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	156.30	0.00	(156.30)	0.00	
2025000374	666745	PP	2024	HACKWELDER, PAULA MARIE	9/3/2025	Value	8,424	0	(8,424)		TAXPAYER MOVED
Public Notes:						Tax	69.62	0.00	(69.62)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	69.62	0.00	(69.62)	0.00	
2025000765	667217	PP	2024	FONSECA, CHRISTOPHER LEE	9/18/2025	Value	1,395	0	(1,395)		DUPLICATE ASSESSMENT
Public Notes:						Tax	8.95	0.00	(8.95)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8.95	0.00	(8.95)	0.00	
2025000593	667224	PP	2024	CHORNY, ILONA ALEKSANDROVN	9/12/2025	Value	60,409	0	(60,409)		TAXPAYER MOVED
Public Notes:						Tax	658.76	0.00	(658.76)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	658.76	0.00	(658.76)	0.00	
2025000811	667283	PP	2024	MCMILLAN, DOMINIQUE CURTIS	9/24/2025	Value	2,075	0	(2,075)		TAXPAYER MOVED
Public Notes:						Tax	22.63	0.00	(22.63)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	22.63	0.00	(22.63)	0.00	

Correction Listing Report

Union County

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2025/10/01 10:16:47 AM

Date Posted between 9/1/2025 and 9/30/2025

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025000764	667357	PP	2024	CROUSE, BRANDON LINDSAY	9/18/2025	Value	28,342	0	(28,342)		TAXPAYER MOVED
Public Notes:						Tax	290.59	0.00	(290.59)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	290.59	0.00	(290.59)	0.00	
2025000375	667359	PP	2025	CROUSE, BRANDON LINDSAY	9/3/2025	Value	0	0	0		TAXPAYER MOVED
Public Notes:						Tax	0.00	0.00	0.00		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	0.00	0.00	0.00	
2025000375	667359	PP	2024	CROUSE, BRANDON LINDSAY	9/3/2025	Value	91,807	0	(91,807)		TAXPAYER MOVED
Public Notes:						Tax	941.30	0.00	(941.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	941.30	0.00	(941.30)	0.00	
2025000368	667973	PP	2024	BULLARD, GENEVIEVE MARIE	9/3/2025	Value	47,147	7,253	(39,894)		TAXPAYER MOVED
Public Notes:						Tax	483.40	74.37	(409.03)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	483.40	74.37	(409.03)	0.00	
2025000813	668431	PP	2024	UMANSKY, PAUL BENOIT	9/24/2025	Value	5,344	0	(5,344)		SOLD PP ASSET
Public Notes:						Tax	44.17	0.00	(44.17)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	44.17	0.00	(44.17)	0.00	
2025000596	668617	PP	2024	OPREA REALTY GROUP LLC & OPREA, EMANUELA	9/12/2025	Value	20,767	0	(20,767)		DUPLICATE ASSESSMENT
Public Notes:						Tax	146.99	0.00	(146.99)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	146.99	0.00	(146.99)	0.00	



Union County, NC

Staff Report

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

File #: 25-657

Agenda Date: 10/20/2025

TITLE:

Amendment to the Union County Pay and Classification Plan

INFORMATION CONTACT:

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

ACTION REQUESTED:

- 1) Approve a revision of the Union County Pay and Classification Plan to include the following:
 - A) Add the following classification title and associated pay grade:
 - i) Animal Services Supervisor - pay grade I

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.

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 #: 25-639

Agenda Date: 10/20/2025

TITLE:

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Draft minutes have been provided to the Board of Commissioners 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 #: 25-623

Agenda Date: 10/20/2025

TITLE:

Communications Monthly Report - September 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

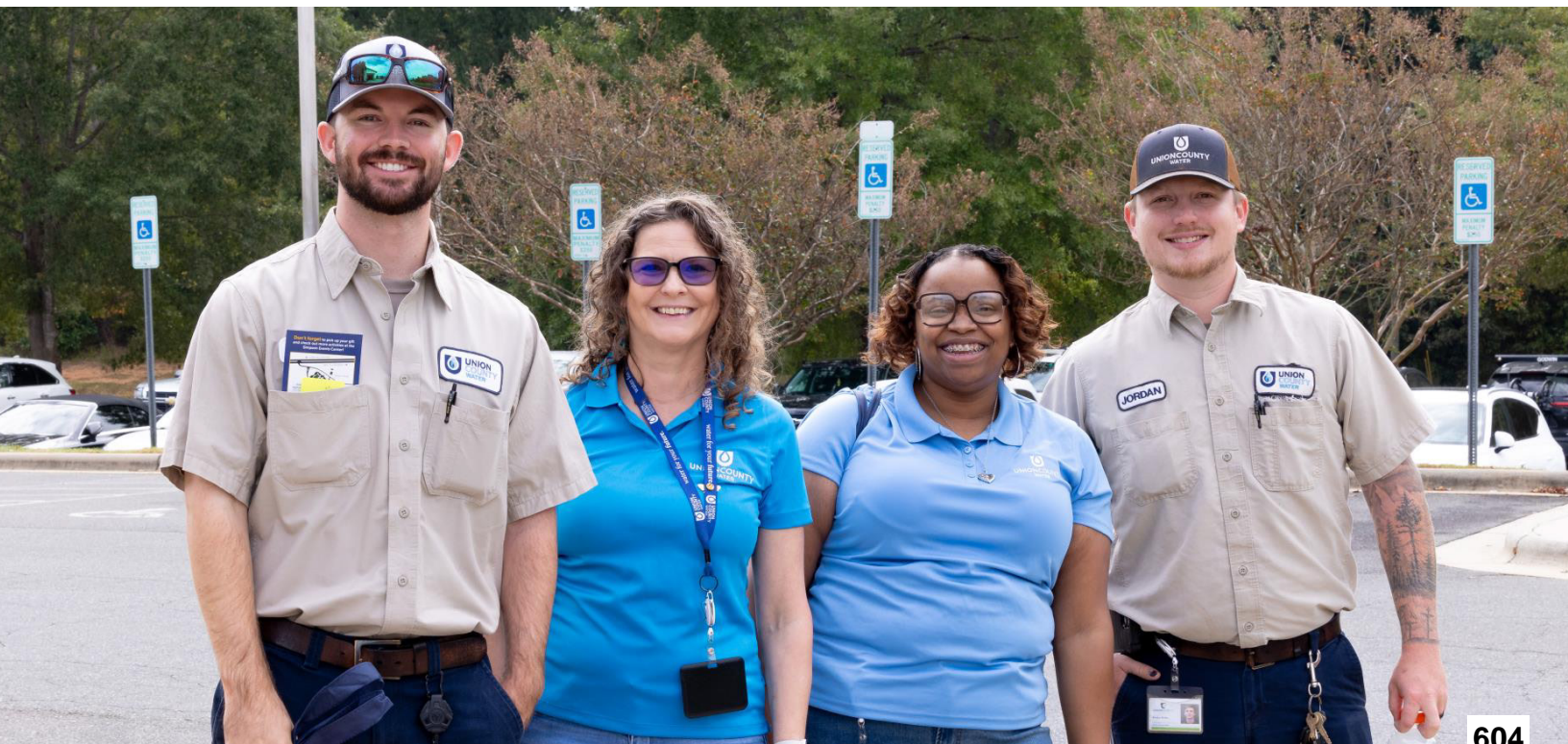
FINANCIAL IMPACT:

None.



Communications Monthly Report

September 2025



Top Projects

1

Household Hazardous Waste Event

The Solid Waste Department's annual Household Hazardous Waste collection event relies on a robust communications plan to ensure residents know how to participate in the event and what to expect when they arrive. This year's plan included a video, printed flyers, a social media campaign, a news story, and event listing on the county website. The event resulted in the collection of 47,550 tons of hazardous materials from approximately 650 households in Union County.



2

Employee Health & Benefits Expo

Public Communications supported Human Resources by coordinating communications and promoting our 16th annual all-employee event to meet benefit vendors. The event was a success with almost 600 employees attending and a record \$1,700 in raffle tickets sold to benefit the Christmas Bureau.



3

National Preparedness Month

Because September is National Preparedness Month, the Communications team shared a weekly preparedness message on social media on behalf of Emergency Management, encouraging residents to take proactive steps to stay safe. We also amplified important information across additional platforms, ensuring consistent and timely messaging to reach a broad audience.

National Preparedness Month



UNIONCOUNTY
EMERGENCY SERVICES



87

Projects
Completed



18

Departments
Supported

Website



Top Search Terms

- 1 Passport
- 2 Summons
- 3 Inmate
- 4 Jobs
- 5 Arrest

Top Webpages

- 1 Pay My Water Bill
- 2 GIS & Mapping
- 3 Taxes & Property

Website Visits

unioncountync.gov

371,826



Sprout Automated Webchat

594 Residents Engaged

816 Total Communications Per Month

Social Media



42,541
Total Followers



Top Posts

Join us in welcoming our newest employees to serving Union County! Drop a "welcome" in the comments to help us make them feel at home!

Looking for a rewarding career with great benefits and the chance to make a difference? Explore our open positions today: ucgov.info/careers and save the date for our Career Fair on Oct. 29! Check out details at ucgov.info/careerfair



Facebook

14.4 % Engagement Rate
22,852 Reach



LinkedIn

33% Engagement Rate
1,240 Impressions



union_county.nc • 2w
Honoring a Local Hero 🏆 Our own @union_county_parks Superintendent, Jared Steele, has been recognized by the NC Association of County Commissioners (@nacc1906) through the Heroic Hands initiative!

From land use planning and conservation at Cane Creek Park to volunteering for the Firefighters' Burned Children's Fund and strengthening local emergency response, Jared's impact is felt across our community. Join us in congratulating Jared on this well-deserved honor! #HeroicHands #UnionCountyNC #CommunityImpact #LocalHero #NCACC #LocalGov

appearing_weekly • 2w
31 likes
September 19

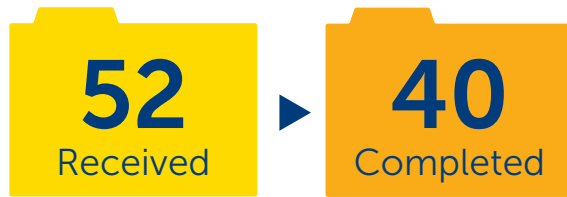


Instagram

2.1% Engagement Rate
1,571 Impressions

Engagement rate is calculated by dividing the total number of interactions on a post (likes, comments, shares, clicks) by the total number of impressions that post received, then multiplying by 100 to get a percentage. **Impressions** are the number of times a user sees a post. **Reach** refers to the total number of individuals who saw a specific post on social media.

Public Records Requests



Media Interactions



Creative Highlights



How To Instruction Sheets
for the Finance Department



HEART Union
Logo



Property Flyer

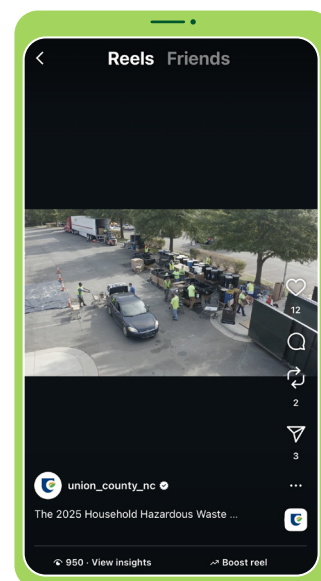
Video Engagement



YouTube
Employee Service Awards
240 Views
11.5 Hours Watch Time



Facebook
Household Hazardous
Waste Event Promo
3,400 Views



Instagram
Household Hazardous
Waste Event Promo
950 Views



Union County, NC

Staff Report

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

File #: 25-625

Agenda Date: 10/20/2025

TITLE:

Contract Report July - September 2025

INFORMATION CONTACT:

Corey Brooks, Procurement & Contract Management, Interim Director, 704-283-3683

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Per Section XVIII of the FY 2026 adopted Operating and Capital Budget Ordinance, the contract report lists executed contracts and purchase orders that were entered into by the County Manager or Procurement designee from July through September 2025.

FINANCIAL IMPACT:

As noted on contracts and purchase orders.

Contract Report
July - September 2025

Department	Vendor	Purpose	Amount	Date
Human Services - Public Health	Living Goodness, Inc.	provide medical director services for public health	\$ 84,400.00	7/1/2025
Budget	North Carolina Department of Military and Veteran Affairs	Grant from NC DMVA for \$18,288.98 to purchased goods, equipment, and services related to better serve veterans in Union County.	\$ 18,288.98	7/2/2025
Environmental Health	HS GovTech Solutions, Inc.	Renewal letter extending for additional one year term	\$ 38,160.00	7/2/2025
Facilities and Fleet Management	JOHNSON CONTROLS US HOLDINGS LLC	NVR SERVER FOR ADULT PROBATION	\$ 3,962.51	7/3/2025
Fire Services	DANA SAFETY SUPPLY	Computer mount package	\$ 4,312.75	7/3/2025
Facilities and Fleet Management	ALLISON FENCE CO INC	JUDICIAL CENTER BARRIER GATE OPERATOR	\$ 5,468.00	7/3/2025
Facilities and Fleet Management	CONNECTIVITY LLC	9TH FLOOR LENCORE SPEAKER STATION INSTALL	\$ 5,669.15	7/3/2025
Facilities and Fleet Management	KKC CONTRACTING INC	GOVERNMENT CENTER GLASS REPLACEMENT	\$ 6,798.76	7/3/2025
Fire Services	DAVENPORT GROUP	DATA PROCESSING EQUIPMENT/SYS	\$ 14,892.00	7/3/2025
County Manager's Office	Lawrence Associates, P.A.	Entering this Task Order for EDC, If you have any project specific questions please contact Ron Mahle. Task Order for professional surveying services associated with the County owned Goldmine Rd Property. The service will be a Boundary Survey/Plat: Verify the previously completed boundary survey. Field locate and improvements and/or encroachments and generate a plat suitable for recordation.	\$ 10,000.00	7/7/2025
Budget	Common Heart, Inc.	Community Partner Grant funding for the purpose of eradicating food insecurity, eliminating generational poverty and provide economic empowerment programs.	\$ 20,000.00	7/7/2025
Sheriff's Office	NC STATE BUREAU OF INVESTIGATION	(29) DESKTOP DCIN TERMINAL FEES 07/01/25-12/31/25	\$ 20,262.00	7/7/2025
Sheriff's Office	YOUSEF SANSOUR	SRT BALLISTIC HELMETS (20)	\$ 25,100.00	7/7/2025
Budget	New Covenant Community Development Center	Community Partner Grant Funding for the purpose of providing a range of educational and experiential learning opportunities for economically and socially at-risk youth	\$ 35,000.00	7/7/2025
Budget	IGM Technology Corp.	Gravity Budget & Reporting Software (includes base platform, budget book, budgeting and analytics, transparency and digital budget book) - renewal for year 2	\$ 41,475.00	7/7/2025
Union County Water - Water & Wastewater	HYDROSTRUCTURES, P.A.	Union County Union County Water staff have identified certain areas within the Crooked Creek Collection system with excessive levels of inflow and infiltration (I/I) during periods of wet weather. Phase I addressed the entire basin with 5 flow meters. Given the size of the basin, Phase II will divide up the five basins further to identify to perform flow monitoring and I-I analysis within the sub-basin FM 5 by installing flow monitors for a period of 90 days and performing an analysis of the data to	\$ 48,500.00	7/8/2025
Budget	Safer Communities Ministry, Inc.	Community Partner Grant funding for the purpose of providing life changing program services to prisoners, ex-offenders, and their families.	\$ 90,000.00	7/9/2025
Union County Water - Engineering	CSX Transportation Inc	Facility Encroachment Agreement with CSX Transportation Inc permitting a 12-inch waterline crossing of CSX right-of-way near Indian Trail Road and Blythe Drive. This is associated with the Indian Trail Town Center project	\$ 1.00	7/10/2025
Sheriff's Office	NCASRO	NCASRO CONFERENCE REGISTRATION 2025	\$ 6,600.00	7/10/2025
Union County Water - Water & Wastewater	HEYWARD INCORPORATED	HEYWARD, \$ 11030.44, MAGNETIC FLOW METER SYST	\$ 11,030.44	7/10/2025
911 Communications	VDA LABS LLC	VMWare for Servers	\$ 13,680.00	7/10/2025
Fire Services	RHINEHART FAMILY COMPANY INC	Cylinders	\$ 13,928.00	7/10/2025
TRANSPORTATION	INDUSTRIAL SIGN & GRAPHICS INC	5 VEHICLE WRAPS FOR 5 NEW TRANSPORT VANS	\$ 15,075.00	7/11/2025
Facilities and Fleet Management	R&J STARNES PAINTING CONTRACTORS	CONSTRUCTION OF WALLS AT NEW FIRING RANGE BLDG	\$ 18,240.00	7/11/2025
Facilities and Fleet Management	SHAW INTEGRATED AND TURF SOLUTIONS, INC	VETERAN'S SERVICES FLOORING	\$ 20,961.48	7/11/2025
Facilities and Fleet Management	DEMOLITION AND ASBESTOS REMOVAL INC	REMOVE ASBESTOS & FLOORING AT HISTORIC POST OFFICE	\$ 22,190.00	7/11/2025
TRANSPORTATION	BLOSSMAN SERVICES INC	5 PROPANE CONVERSION KITS FOR 5 NEW VANS	\$ 48,130.00	7/11/2025
Union County Information Technology	SMARTDRAW SOFTWARE LLC	SmartDraw Software Renewal	\$ 2,995.00	7/14/2025

Contract Report
July - September 2025

Union County Water - Planning & Resource Mgmt	CentralSquare Technologies, LLC	Routine Business Process Review (Health Check) for WMMS Lucity Implementaiton. Review and analyze latest configuration with recent upgrade to ensure full utilization of security, preventive maintenance, and schedule modules. Also reviewing new capabilities in reporting and dashboards. Last performed health check of this system in 2021. CentralSquare is performing the review to compare our current configuration to their intended best practices.	\$ 6,840.00	7/14/2025
Union County Information Technology	LENOVO (UNITED STATES) INC	52 ThinkPads L16 G1 for Board of Elections	\$ 47,297.00	7/14/2025
Union County Water - Water & Wastewater	HOWDEN USA COMPANY	HOWDEN, \$3185, LABYRONTH SEALING	\$ 3,185.00	7/15/2025
Finance	Bingham Arbitrage Rebate Services, Inc.	Arbitrage rebate compliance review of County issued debt. Option to renew for additional 2 years under contract 7684 July 6, 2022	\$ 14,000.00	7/15/2025
Union County Water - Business Operations	CUSTOMER SERVICE SOLUTIONS INC	CSS, \$28,880, CS ASSESSMENT	\$ 28,880.00	7/15/2025
Budget	Community Health Services of Union County, Inc.	Community Partner Grant Funding for the purpose of providing healthcare access to our uninsured adult population.	\$ 150,000.00	7/15/2025
Library	THE LIBRARY CORPORATION	LIBRARY PATRON SOFTWARE, PLATFORM, AND LICENSING	\$ 61,499.26	7/16/2025
Facilities and Fleet Management	LOCKWOOD IDENTITY INC	UPDATE TO THE SWRL SIGN FOR ADDRESS CHANGE	\$ 3,265.00	7/17/2025
Facilities and Fleet Management	STEPHENS OFFICE SYSTEMS INC	PROGRESS BUILDING CONFERENCE ROOM CHAIRS	\$ 4,598.74	7/17/2025
Fire Services	NEWTON'S FIRE AND SAFETY EQUIPMENT INC	MSA Cyl 5500 psig, 66 cu ft	\$ 6,600.00	7/17/2025
Union County Water - Water & Wastewater	MCNAUGHTON-MCKAY ELECTRIC COMPANY	MCNAUGHTON, \$7897.34, EQUIPMENT	\$ 8,259.74	7/17/2025
Facilities and Fleet Management	GARMON MECHANICAL SERVICE INC	SPLIT AC UNIT FOR TRANSPORTATION/PROGRESS BUILDING	\$ 11,900.00	7/17/2025
Facilities and Fleet Management	MSS FIRE & SECURITY LLC	GOVERNMENT CENTER CAMERA REPLACEMENTS	\$ 26,665.00	7/17/2025
Facilities and Fleet Management	MSS FIRE & SECURITY LLC	UPDATE CAMERAS AT OPS CTR, CANE CREEK STORE, & HCH	\$ 29,950.00	7/17/2025
911 Communications	US Digital Designs, Inc. (Honeywell)	Maintenance for US Digital Designs	\$ 5,497.79	7/18/2025
Finance	Capital Management of the Carolinas, LLC	Capital Management will pay a portion of our fee for arbitrage compliance services on the 2025B GO Bonds.	\$ 5,500.00	7/18/2025
Finance	Capital Management of the Carolinas, LLC	Capital Management will pay a portion of our fee for arbitrage compliance services on the 2025A 2/3 Bonds.	\$ 5,500.00	7/18/2025
County Manager's Office	Catapult Employers Association, Inc.	Training contract for FY26 Learning and Development program, dates in August are set, 8/14 and 8/21. We haven't set dates yet for February. Payment is due 10 days before the start of the first session.	\$ 10,282.00	7/18/2025
Union County Information Technology	VDA LABS LLC	Veeam Annual Renewal	\$ 18,267.53	7/18/2025
Union County Water - Water & Wastewater	FERGUSON US HOLDINGS INC	FERGUSON, \$22360, BODY COMB AIR VLV	\$ 22,360.00	7/18/2025
911 Communications	Timclock Plus LLC	To renew the scheduling software the department is using for 5 years to lock in at a discounted rate.	\$ 23,101.17	7/18/2025
Sheriff's Office	KIESLER POLICE SUPPLY, INC	9MM AMMO UCSO FIRING RANGE	\$ 29,951.64	7/18/2025
Union County Information Technology	VDA LABS LLC	VMware Annual Renewal	\$ 48,640.00	7/18/2025
County Attorney's Office	West Publishing Corporation (Thomson Reuters Enterprise Centre GmbH)	3-year + 1 month contract for West Proflex on-line legal research access	\$ 127,876.10	7/18/2025
Library	DAVENPORT GROUP	DATA PROCESSING EQUIPMENT/SYS	\$ 21,160.00	7/21/2025
Library	Klub Foam LLC	Contractor/Licensee Agreement for "Mess-tival" event at the end of summer reading party at Southwest Regional Library. Klub Foam has already executed the Master Agreement for Foam Parties.	\$ 500.00	7/22/2025
Human Services - Community Support and Outreach	Verified First, LLC	software for background checks for senior nutrition volunteers.	\$ 960.00	7/22/2025
Sheriff's Office	Idemia Identity & Security USA LLC	Amendment #2 Maintenance and Support Agreement #003050-003 for all equipment at Union County Sheriff's Office.	\$ 14,767.00	7/23/2025
Facilities and Fleet Management	STEPHENS OFFICE SYSTEMS INC	TABLE AND CHAIRS FOR GARAGE KITCHETTE	\$ 1,530.03	7/24/2025
Facilities and Fleet Management	THE BOYD GROUP US INC	GERBER - REPAIRS TO ASSET 27-24 - DEDUCTIBLE	\$ 5,000.00	7/24/2025
Facilities and Fleet Management	SUMMIT TOPCO, LP	CLASSIC COLLISION - REPAIRS TO ASSET 07-23	\$ 5,000.00	7/24/2025
Facilities and Fleet Management	ACOUSTICAL SOLUTIONS LLC	ACOUSTIC PANELING FOR SO INTERROGATION ROOMS	\$ 5,568.95	7/24/2025
County Manager's Office	UNC Charlotte	Agreement for training to be delivered by UNC to UC for Leadership Academy in April 2026.	\$ 6,750.00	7/24/2025
Facilities and Fleet Management	LOCKWOOD IDENTITY INC	GRANITE SIGN FOR THE UC CEMETERY	\$ 8,429.99	7/24/2025
Union County Water - Water & Wastewater	GML CONTRACTORS SERVICES INC	GML CONTRACTOR, \$9650, SEEDING	\$ 9,650.00	7/24/2025

Contract Report
July - September 2025

Facilities and Fleet Management	Greenway Chemical Systems & Services, Inc.	Renew contract #7813 for Water Treatment Services for one year with the option to renew for one additional year.	\$ 10,037.04	7/24/2025
Facilities and Fleet Management	Automated Fire Systems, Inc.	Renew contract #7802 for one additional year with one more renewal option available.	\$ 12,200.00	7/24/2025
Union County Water - Water & Wastewater	PARKER'S CONCRETE SOLUTIONS LLC	PARKERS CONCRETE, \$15380, INSTALL WALLS ON PAD	\$ 15,380.00	7/24/2025
Facilities and Fleet Management	AUTOMATED FIRE SYSTEMS INC	SERVICE FOR THE FIRE SUPPRESSION SYSTEM AT GC & JC	\$ 21,180.00	7/24/2025
Union County Water - Water & Wastewater	LONE STAR BLOWER INC	LONESTAR BLOWER, \$21280, SERVICE BLOWER	\$ 21,280.00	7/24/2025
Union County Water - Water & Wastewater	INFRASTRUCTURE & PROCESS SOLUTIONS LLC	INFRASTRUCTURE& PROCESS, \$24645, COMBO AIR VALVE	\$ 24,645.00	7/24/2025
Facilities and Fleet Management	MSS Fire & Security, LLC	Renew contract #7731 for fire alarm testing and related services for an additional year (year four with one more renewal option)	\$ 46,548.24	7/24/2025
Facilities and Fleet Management	Kraft Power Corporation	Renew contract #7814 for one year with the option to renew for one additional year	\$ 47,727.00	7/24/2025
Union County Water - Water & Wastewater	Southern Ionics Incorporated	Sodium Aluminate purchase for process control at the Twelve Mile WRF. Sodium Aluminate is used to aid in the removal of phosphorus at the WRF.	\$ 100,000.00	7/24/2025
911 Communications	DAVENPORT GROUP	Portable Monitors	\$ 1,722.00	7/25/2025
Union County Water - Water & Wastewater	PETE DUTY AND ASSOCIATES INC	PETE DUTY, \$6225, OLDENBURG PUMP REPLACEMENT	\$ 6,225.00	7/25/2025
Sheriff's Office	SUR TEC INC	SURTEC CASPER 10X- NARCOTICS	\$ 8,738.00	7/25/2025
911 Communications	MOTOROLA SOLUTIONS, INC	Radio Antenna Supplies	\$ 12,917.40	7/25/2025
Union County Water - Water & Wastewater	BW SERVICES LLC	BW SERVICE, \$15,580, INSTALL FLOW MRT HUNLEY CRK	\$ 20,300.00	7/25/2025
911 Communications	ENDURA LLC	Chairs for Primary PSAP	\$ 20,480.14	7/25/2025
Facilities and Fleet Management	SNAP-ON INCORPORATED	FINAL TOOL SET FOR FLEET SHOP TECHNICIAN	\$ 34,940.68	7/25/2025
Sheriff's Office	GENERAL MEDICAL DEVICES INC	AEDS (40), PADS, BATTERY PACKS, SHERIFF'S OFFICE	\$ 56,165.00	7/25/2025
Sheriff's Office	JOHNSON CONTROLS US HOLDINGS LLC	UCSO EXACQ MAINTENANCE AND WINPAK MAINTENANCE	\$ 66,559.62	7/25/2025
Union County Water - Water & Wastewater	Polydyne	Fifth renewal of contract #8066 thickening and dewatering polymer for the Twelve Mile Creek WRF.	\$ 58,000.00	7/26/2025
Union County Water - Engineering	CDM Smith Inc.	Task Order 8686-05, Forest Park Pump Station Expansion – Force Main And Pump Station Evaluation.	\$ 99,995.00	7/26/2025
Facilities and Fleet Management	Daikin Applied Americas Inc.	Enter into contract with Daikin Applied Americas for Chiller and Boiler Maintenance Service	\$ 53,508.00	7/28/2025
Tax Administration - Appraisal	CoStar Realty Information, Inc.	Amendment to renew for 4 years for Commercial Real Estate information services/site licenses.	\$ 75,392.04	7/28/2025
Union County Information Technology	DAVENPORT GROUP	Two Dell PCs for New Employee @ Security and Risk	\$ 4,155.00	7/30/2025
Union County Water - Water & Wastewater	HD SUPPLY INC	USA BLUE BOOK, \$5796.63, SPECTROPHOTOMER	\$ 5,796.63	7/30/2025
Union County Water - Water & Wastewater	LINDER INDUSTRIAL MACHINERY	LINDER, \$9536.47, REPAIR CASE 85 EXCAVATOR	\$ 9,536.47	7/30/2025
Union County Water - Business Operations	YADKIN-PEE DEE WATER MANAGEMENT GROUP	YADKIN PEEDEE, \$15,000, ANNUAL DUES	\$ 15,000.00	7/30/2025
911 Communications	MEDICAL PRIORITY CONSULTANTS	Protocol and QA Software	\$ 33,280.52	7/30/2025
Union County Solid Waste	FLEETGENIUS OF NC INC	Fleet Genius, \$33,846, Recycling boxes	\$ 33,846.00	7/30/2025
911 Communications	CENTRALSQUARE TECHNOLOGIES, LLC	DATA MIGRATION FOR SERVERS	\$ 36,855.00	7/30/2025
911 Communications	DAVENPORT GROUP	COMPUTERS FOR PRIMARY PSAP	\$ 39,052.00	7/30/2025
Union County Water - Planning & Resource Mgmt	Langan NC, Inc	First Task Order with Langan Engineering for continued development of UC Water's Condition and Criticality Model.	\$ 75,000.00	7/30/2025
County Manager's Office	Gympass US, LLC d/b/a Wellhub	**This Agreement is condition upon appropriation. - Legal please add proper language. Wellhub is a platform that enables employers or other organizations to provide a comprehensive fitness and wellness program to their employees. Wellhub provides a personalized well-being network, accessed by website or application, which offers employees unrivaled access to thousands of ways to feel good, including gyms, studios, online classes, well-being solutions, personal trainers and other resources.	\$ 7,247.08	7/31/2025
Economic Development	BGE, Inc.	Provide due diligence and planning services for the Wingate Site project. Union County parcels: 09015013B, 09015013E 09015013, 09015013F and 09012003C, totaling approximately 71 acres. Additional services will require additional fees.	\$ 11,200.00	7/31/2025

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		Change Order No. 1: Final adjusting Change Order to reconcile the bid quantities with actual installed quantities for all contract items. This CO includes additional costs associated with the jumper connections, cypress tree removal and concrete apron replacement.		
Union County Water - Engineering	Dawn Development Company, Inc.		\$ 127,425.50	7/31/2025
Union County Information Technology	VDA LABS LLC	ManageEngine ADAudit Renewal	\$ 1,795.00	8/1/2025
Facilities and Fleet Management	THE BOYD GROUP US INC	REPAIRS TO ASSET 55-22 - DEDUCTIBLE	\$ 5,000.00	8/1/2025
Facilities and Fleet Management	SUMMIT TOPCO, LP	REPAIRS TO ASSET 48-19 - DEDUCTIBLE	\$ 5,000.00	8/1/2025
Facilities and Fleet Management	STEPHENS OFFICE SYSTEMS INC	OFFICE FURNITURE FOR PROCUREMENT	\$ 5,388.35	8/1/2025
Union County Water - Water & Wastewater	SOUTHEAST ELECTRICAL SERVICES LLC	SOUTHEAST ELECTRICAL, \$5400, STEVENS MILL STATION	\$ 5,400.00	8/1/2025
TRANSPORTATION	KRUEGER INTERNATIONAL INC	KRUEGER INTERNATIONAL WORKSTATION FURNITURE	\$ 6,446.13	8/1/2025
Facilities and Fleet Management	DEMOLITION AND ASBESTOS REMOVAL INC	FAIRVIEW ASBESTOS REMOVAL	\$ 8,600.00	8/1/2025
Union County Solid Waste	CAROLINA 1926 LLC	Carolina CAT, \$8,830.83, 953 right final repair	\$ 8,830.83	8/1/2025
Union County Water - Water & Wastewater	GARRISON ENTERPRISES INC	GARRISON ENTERPRISE, \$9025, INSTALL 8" INSERTA VLV	\$ 9,025.00	8/1/2025
County Manager's Office	Wright Creative Group, LLC d/b/a Forward Partners	FY26 Learning and Development Speaker Series Speaker Contract	\$ 10,600.00	8/4/2025
Facilities and Fleet Management	Trash Control Inc.	Amend contract #8812 to remove one (1) 4yd container and add one (1) 8yd container at Cane Creek Camping Area and add one (1) 8yd container at Jesse Helms Park.	\$ 2,346.00	8/5/2025
Human Services - Veterans Services	Tyler Technologies, Inc.	Renewal of contract for one additional year.	\$ 2,635.00	8/5/2025
Union County Water - Water & Wastewater	CURTIS POWER SOLUTIONS LLC	CURTIS POWER, \$7191.05, WTP BATTERY CHG REPLM	\$ 7,191.05	8/5/2025
Human Resources	BUSINESS IMPACT GROUP LLC	Items to be given away at Employee Expo	\$ 7,502.39	8/5/2025
SOIL CONSERVATION	HYATT LAND SURVEYING	Broome Survey	\$ 9,000.00	8/5/2025
Sheriff's Office - 1431	Dynamic Imaging Systems, Inc.	Amendment/Renewal #6: Support and Maintenance Contract for PictureLink Imaging Systems	\$ 9,493.20	8/5/2025
Union County Water - Water & Wastewater	HEYWARD INCORPORATED	HEYWARD, \$11675, SAMPLER	\$ 11,675.00	8/5/2025
Facilities and Fleet Management	Johnson Controls Fire Protection LP	Renew contract #7834 for an additional year with one more renewal option available	\$ 11,720.00	8/5/2025
Human Services - Public Health	PFIZER INC	Blanket PO for Vaccine Purchases	\$ 15,000.00	8/5/2025
Human Services - Public Health	MCKESSON MEDICAL SURGICAL INC	Blanket PO for Vaccine Purchases	\$ 15,000.00	8/5/2025
Human Services - Public Health	SANOI-AVENTIS PASTEUR	Blanket PO for Vaccine Purchases	\$ 15,000.00	8/5/2025
Human Services - Public Health	GLAXOSMITHKLINE PHARMACEUTICALS	Blanket PO for Vaccine Purchases	\$ 15,000.00	8/5/2025
Human Services - Public Health	MERCK SHARP AND DOHME CORPORATION	Blanket PO for Vaccine Purchases	\$ 15,000.00	8/5/2025
Sheriff's Office - 1429	Black Creek Integrated Systems Corp.	Amendment #8: Renew Agreement for one year Security System at UCSO Jail.	\$ 17,639.00	8/5/2025
Public Communications	LOCKWOOD IDENTITY INC	UNCLASSIFIED EQUIP/SUPPLIES	\$ 21,269.99	8/5/2025
Union County Water - Business Operations	APPLEONE INC	APPLEONE, \$23,000, Temporary Staffing	\$ 23,000.00	8/5/2025
911 Communications	AGCOP, LLC	Professional services to assist with the recruitment, backgrounds, and retention of telecommunicators in addition to other assistance for programs, practices, and other associated activities for Emergency Services.	\$ 24,000.00	8/5/2025
Facilities and Fleet Management	Anticimex Carolinas, LLC	Renew contract #7772 for one year with the option to renew for one additional year	\$ 31,228.00	8/5/2025
Facilities and Fleet Management	GIS Workshop LLC dba gWorks	Fleet Management Software	\$ 35,436.27	8/5/2025
Human Services - Public Health	Union County Public Schools	Contract for school nurse funding FY 25-26	\$ 50,000.00	8/5/2025
Union County Water - Water & Wastewater	TRANSOURCE INC	TRANSOURCE, \$149,750, 2026 TRACTOR	\$ 149,750.00	8/5/2025
Facilities and Fleet Management	STEPHENS OFFICE SYSTEMS INC	OFFICE FURNITURE FOR JASON MAY - GC 7TH FL	\$ 7,900.81	8/6/2025
Facilities and Fleet Management	BLACK CREEK INTEGRATED SYSTEMS CORP	BLACK CREEK ONSITE ASSESSMENT FOR DETENTION CTR	\$ 13,890.00	8/6/2025
Union County Water - Engineering	CDM Smith, Inc.	Task Order 8686-06 - Lead & Copper Rule Improvements Program Support Scope includes assistance with further service line inventory development, updated lead sampling plan, and updated communication plan.	\$ 150,000.00	8/6/2025
Planning	Town of Indian Trail	Indian Trail and Wesley Chapel interlocal agreements for the Union County 2024 Limited Area East Fork Twelve Mile Creek Flood Analysis Design and Cost Estimate Study. Each community is contributing \$10,000 towards the cost of the study. These went to the BOCC on 7/15/2024 to authorize Brian to sign.	\$ 10,000.00	8/7/2025
Union County Solid Waste	INTERSTATE SUPPLIES & SERVICES INC	Interstate Supplies & Service, \$12,477.96, mower	\$ 12,477.96	8/7/2025

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Library	Bibliotheca, LLC	Annual Software and Maintenance Agreement: July 1, 2025 - June 30, 2026	\$ 32,260.45	8/7/2025
Economic Development	Southern Electrical Equipment Company, Inc	Award a "STEP 2" incentive grant to Southern Electrical Equipment Company, Inc. in an amount not to exceed \$133,000. This grant would be paid over a five-year period beginning in FY 2027.	\$ 133,000.00	8/7/2025
Soil & Water Conservation	Construction and Environmental Services LLC	Stream Debris Removal Services on Beaverdam Creek	\$ 139,391.28	8/7/2025
Union County Water - Water & Wastewater	Charles R. Underwood, Inc.	IFB 2025-041; Hwy 75 Pump and Motor Replacement	\$ 85,468.99	8/9/2025
Facilities and Fleet Management	Automated Fire Systems, Inc.	Amend contract #7802 and add the Fairview EMS located at 7402 Concord Hwy., Monroe NC,28110.	\$ 500.00	8/11/2025
Human Services - Community Support and Outreach	Indian Trail United Methodist Church	Senior nutrition site visit agreement	\$ 1,200.00	8/11/2025
Union County Water - Water & Wastewater	DATA FLOW SYSTEMS, INC	DATA FLOW \$5453 FILTERS	\$ 5,453.00	8/11/2025
Facilities and Fleet Management	MSS FIRE & SECURITY LLC	FIRE PANEL REPAIR AT THE AG CENTER	\$ 5,566.21	8/11/2025
Union County Water - Water & Wastewater	VALVE AND ACTUATION SERVICES	VALVE & ACTUATION \$5674 LIMITORQUE REBUILD	\$ 5,674.00	8/11/2025
Facilities and Fleet Management	CM BOWERS LLC	ELECTRICAL WORK FOR NEW BLDG AT THE FIRING RANGE	\$ 12,033.00	8/11/2025
Facilities and Fleet Management	DRYS ENTERPRISE INC	JUDICIAL CENTER DOOR REPLACEMENT	\$ 13,500.00	8/11/2025
Facilities and Fleet Management	R&J STARNES PAINTING CONTRACTORS	SHERIFF'S OFFICE DETENTION CENTER PAINTING	\$ 19,650.00	8/11/2025
Union County Water - Water & Wastewater	KCI Associates of North Carolina, P.A	Union County desires for KCI will utilize instruments to measure the odor at the of the Forest Park force main discharge manhole, analyze the data, and develop a technical memorandum outlining and evaluating the field results obtained by the odor instruments from the current CAL-X Pilot.	\$ 23,210.00	8/11/2025
Union County Water - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$28346.71, EASY LINK ANNUAL SUPPORT	\$ 28,346.71	8/11/2025
Union County Solid Waste	FLEETGENIUS OF NC INC	Fleet Genius, \$35,450, Recycling boxes for sites	\$ 35,450.00	8/11/2025
Facilities and Fleet Management	TK Elevator Corporation	Renew contract #7769 for an additional year with one more renewal option available.	\$ 42,517.82	8/11/2025
Human Services - Public Health	The North Carolina Alliance of Public Health Agencies, Inc.	FY 2026 Medicaid Consulting Services invoice, Business Associate Agreement and Memorandum of Understanding.	\$ 4,915.63	8/12/2025
Human Services - Social Services	MCCi, LLC	Laserfiche Workflow to Copy Metadata from Northwoods Compass	\$ 8,100.00	8/12/2025
Facilities and Fleet Management	YARO PLUMBING INC	REPAIR CAST IRON LEAKING AT THE GOVERNMENT CTR	\$ 10,300.00	8/12/2025
Parks and Recreation	Union County Public Schools	To conduct a Cross Country Invitational meet at Jesse Helms Park.	\$ 100.00	8/13/2025
Facilities and Fleet Management	Gensler Architecture, Design & Planning, P.C. dba Gensler	Amend contract #8854 to increase the fees an additional \$1000.00	\$ 1,000.00	8/13/2025
County Manager's Office	Town of Weddington	***Please expedite all the interlocal agreements related to Senior Nutrition Services. Interlocal Agreement between Town of Weddington and Union County for Union County Senior Nutrition Program to Provide nutrition services to 8 residents of the municipality. The Town of Weddington agrees to provide the County with \$15,849.60 to help defray the costs of four residents of the municipality participating in the Program during FY26.	\$ 15,849.60	8/13/2025
Human Services - Public Health	Brewer Company Inc.	Services contract for Paper Folder for PH	\$ 395.00	8/14/2025
Facilities and Fleet Management	LOCKWOOD IDENTITY INC	MONUMENT SIGN FOR FAIRVIEW	\$ 4,330.00	8/14/2025
Sheriff's Office	CARASOFT TECHNOLOGY CORPORATION	MAGNET AXION ESSENTIALS UCSO CSI	\$ 4,620.00	8/14/2025
County Manager's Office	Town of Mineral Springs	Agreement between Town of Mineral Springs and Union County for Union County Senior Nutrition Program to Provide nutrition services to 4 residents of the municipality. The Town of Mineral Springs agrees to provide the County with \$5,803.20 to help defray the costs of four residents of the municipality participating in the Program during FY26.	\$ 5,803.20	8/14/2025
County Manager's Office	The Village of Lake Park	Interlocal Agreement between The Village of Lake Park and Union County for Union County Senior Nutrition Program to Provide nutrition services to 4 residents of the municipality. The Town of Mineral Springs agrees to provide the County with \$5,803.20 to help defray the costs of four residents of the municipality participating in the program during FY26.	\$ 5,803.20	8/14/2025

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		***Please expedite all the interlocal agreements related to Senior Nutrition Services. Interlocal Agreement between Village of Marvin and Union County for Union County Senior Nutrition Program to Provide nutrition services to 3 residents of the municipality. The Village of Marvin agrees to provide the County with \$5,943.60 to help defray the costs of four residents of the municipality participating in the Program during FY26.	\$ 5,943.60	8/14/2025
County Manager's Office	Village of Marvin			
Sheriff's Office	MIRION TECHNOLOGIES LLC	DOSIMETERS UCSO JAIL	\$ 6,300.00	8/14/2025
Sheriff's Office	DANA SAFETY SUPPLY	(2) A/S SILVERADO UPFIT, NO WHELEN	\$ 13,667.12	8/14/2025
Sheriff's Office	CARASOFT TECHNOLOGY CORPORATION	CELLEBRITE CSI DIGITAL LAB	\$ 14,050.00	8/14/2025
Sheriff's Office	STOP STICK LTD	(30) STOP STICK	\$ 15,305.90	8/14/2025
Sheriff's Office	FOREMOST CORPORATION OF AMERICA	UCSO SRO PROMOTIONAL ITEMS	\$ 19,177.00	8/14/2025
SOIL CONSERVATION	G&S LAND MANAGEMENT LLC	Stream Debris Removal	\$ 22,395.00	8/14/2025
		To enter into an agreement with Union-Anson County Habitat for Humanity to expend Community Development Block Grant (CDBG) funds in accordance with the attached Home Repair Program agreement.	\$ 49,000.00	8/14/2025
Budget	Union-Anson County Habitat for Humanity			
Union County Water - Water & Wastewater	CURTIS POWER SOLUTIONS LLC	CURTIS POWER, \$10,599.75, ASCO 300 TRANSITION	\$ 10,599.75	8/15/2025
Library	MIDWEST TAPE LLC	HOOPLA DIGITAL CONTENT; DVDS	\$ 92,000.00	8/15/2025
Library	OVERDRIVE, INC.	EBOOKS, EAUDIOBOOKS, EMAGAZINES, PLATFORM FEE	\$ 134,000.00	8/15/2025
Human Services - Community Support and Outreach	Exercize Innovations, LLC	license to facilitate an evidence-based curriculum (BINGOsize)	\$ 1,635.00	8/18/2025
		A/V upgrades and replacement of equipment, including a TV with a burnt-in screen, in Conference Room 233 at Union County Human Services.	\$ 4,920.74	8/18/2025
Union County Information Technology	Inter Technologies Corporation			
Facilities and Fleet Management	DENNIS WHEELER	CUSTOM BLUEPRINT CABINET FOR BUILDING CODE	\$ 5,901.28	8/18/2025
Union County Water - Water & Wastewater	HACH COMPANY	HACH, \$6176.25, CONTROLLER	\$ 6,176.25	8/18/2025
Union County Water - Business Operations	MOTOROLA SOLUTIONS, INC	MOTOROLA, \$7315.96, PORTABLE RADIOS	\$ 7,315.96	8/18/2025
Human Services - Public Health	Shatamra Jackson	LCSW for Public Health Maternity Clinic	\$ 20,800.00	8/19/2025
Union County Water - Water & Wastewater	VEOLIA WATER TECHNOLOGIES INC	VEOLIA, \$27920.55, TOC ANALYZER	\$ 27,920.55	8/19/2025
Union County Information Technology	THE IP GUYS NET LLC	Edge Firewall Maintenance Renewal (Ecessa)	\$ 5,047.00	8/20/2025
Union County Information Technology	ZOHO CORPORATION	Site24x7 Network Monitoring Renewal	\$ 5,119.00	8/20/2025
Sheriff's Office	QUANTICO TACTICAL INCORPORATED	SRT- LIGHTS. SHAWN MAYHEW	\$ 9,062.00	8/20/2025
		Indian Trail and Wesley Chapel interlocal agreements for the Union County 2024 Limited Area East Fork Twelve Mile Creek Flood Analysis Design and Cost Estimate Study. Each community is contributing \$10,000 towards the cost of the study. These went to the BOCC on 7/15/2024 to authorize Brian to sign.	\$ 10,000.00	8/20/2025
Building Code Enforcement	Village of Wesley Chapel			
		Learning and Development vendor for teaching courses in Leadership Academy, Emerging Leaders, and Speaker Series	\$ 17,000.00	8/20/2025
County Manager's Office	Dawn E. Chanland			
Union County Information Technology	ESCAPE VELOCITY HOLDINGS, INC.	BeyondTrust Renewal	\$ 20,095.80	8/20/2025
		Provide well drilling services for 1000 Walkers Grove Road, Wingate, NC under ARPA enable funding program for well rehabilitation.	\$ 30,000.00	8/20/2025
Budget	Catoe Well Drilling Inc.			
Human Resources	Top Hill, Inc. d/b/a Spiro's Hilltop Fish Fare & Steakhouse	catering for Employee Expo	\$ 18,729.80	8/21/2025
		Amendment #3, add three (3) ROCKET In-Car Systems to Inmate Transport Vans. Terms are the same as current contract #8567.	\$ 29,170.78	8/21/2025
Sheriff's Office - 1429	Utility Associates, Inc.			
		Community Partner Grant funding for the purpose of assisting victims of domestic violence and their dependent children.	\$ 60,000.00	8/21/2025
Budget	Turning Point, Inc.			
Union County Information Technology	DAVENPORT GROUP	DATA PROCESSING EQUIPMENT/SYS	\$ 1,177.00	8/22/2025
		A/V upgrades to Conference Room 817 at Union County Government Center. This includes the two replacement TVs with Samsung Commercial-Grade panels, creation of an A/V system, installation and programming of the wall plate, as well as the installation of various other equipment.	\$ 8,796.06	8/22/2025
Union County Information Technology	Inter Technologies Corporation			
Union County Information Technology	SHI INTERNATIONAL CORP	Zendesk Renewal	\$ 12,956.20	8/22/2025

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Facilities and Fleet Management	McMillan Pazdan Smith, PLLC d/b/a McMillan Pazdan Smith Architecture	Architect to provide additional scope of services to perform space planning and a test fit for approximately 32,000 sf of retail space on West Franklin Street at Dale Street (parcel number 09274035)	\$ 19,500.00	8/22/2025
Union County Water - Water & Wastewater	Univar Solutions USA LLC	Contract renewal for 25% Sodium Hydroxide for the Yadkin River Water Treatment Plant.	\$ 25,000.00	8/22/2025
Budget	Urban Design Ventures, LLC	CDBG Consolidation Plan for the HUD program.	\$ 49,000.00	8/22/2025
Union County Water - Water & Wastewater	Bio-Nomic Services, Inc.	Repair Sewer Main on HWY 74 and 177.25 VFT of MH Rehab.	\$ 97,694.00	8/22/2025
Union County Water - Business Operations	CUSTOMER SERVICE SOLUTIONS INC	CSS, \$6040, #1 SOCIAL CURRENCY TRAINING	\$ 6,040.00	8/26/2025
Union County Water - Business Operations	CUSTOMER SERVICE SOLUTIONS INC	CSS, \$7570, #2 SERV EXCELLENCE PROCESS DESIGN & TR	\$ 7,570.00	8/26/2025
Facilities and Fleet Management	GARMON MECHANICAL SERVICE INC	PB 3-TON SPLIT HEAT PUMP SIGN SHOP & WAREHOUSE OFF	\$ 11,900.00	8/26/2025
Union County Water - Business Operations	APPLEONE INC	APPLEONE, \$23000, Temporary Staffing	\$ 23,000.00	8/26/2025
Human Services - Social Services	West Publishing Corporation d/b/a Thomson Reuters	CLEAR Proflex to enable diligent effort to locate absent parents in Child Welfare Services	\$ 26,707.98	8/26/2025
Union County Water - Water & Wastewater	E.W.P. Group, Inc. d/b/a Lord & Company, Inc.	To provide integration services for UCW department.	\$ 50,000.00	8/26/2025
Union County Water - Water & Wastewater	EnviroWaste Services Group, Inc.	Service Contract for sewer wet well cleaning and hauling	\$ 50,000.00	8/26/2025
Union County Water - Water & Wastewater	PREFERRED SOURCES INC	PREFERRED SOURCE, \$7500, MINERAL SPRING REPLM PUMP	\$ 7,500.00	8/27/2025
Union County Information Technology	ESCAPE VELOCITY HOLDINGS, INC.	Lansweeper Renewal	\$ 8,960.00	8/27/2025
Sheriff's Office	WEST CHATHAM WARNING DEVICES INC	(2) A/S SILVERADO UPFIT WHELEN PARTS	\$ 11,573.38	8/27/2025
Union County Water - Water & Wastewater	HACH COMPANY	HACH, \$12928, REPAIR CASE 02028875	\$ 12,928.00	8/27/2025
Union County Water - Water & Wastewater	NET TECH INTEGRATION LLC	NET TECH, \$14568, VEEAM LICENSES	\$ 14,568.00	8/27/2025
Union County Water - Water & Wastewater	VEOLIA WTS ANALYTICAL INSTRUMENTS INC	VEOLIA WTS ANALYTICAL, \$27920.55, TOC ANALYZER	\$ 27,920.55	8/27/2025
Union County Water - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$29506.49, Base Station Annual Maint.	\$ 29,506.49	8/27/2025
Union County Information Technology	MCCI LLC	ABBY Renewal	\$ 5,840.10	8/29/2025
Parks & Recreation	STEVENS PUMPING SERVICE INC	ON-SITE INSTALLATION/MAINTENANCE SERVICES	\$ 11,500.00	8/29/2025
Union County Information Technology	CARAHSOFT TECHNOLOGY CORPORATION	DocuSign Enterprise and Premier Support Renewal	\$ 14,163.12	8/29/2025
Union County Water - Water & Wastewater	DAVENPORT GROUP	DAVENPORT, \$30400, VMWARE 160 EACH SUBSCRIPTION	\$ 30,400.00	8/29/2025
Union County Water - Business Operations	FERGUSON US HOLDINGS INC	FERGUSON, \$111791.48, SENSUS ANNUAL RENEWALS	\$ 111,791.48	8/29/2025
Union County Water - Water & Wastewater	A&D ENVIRONMENTAL SERVICES	A&D ENVIROMENTAL, \$5990.88, FLUSH FLORIDE	\$ 5,990.88	9/3/2025
Facilities and Fleet Management	ALLEGION ACCESS TECHNOLOGIES LLC	HUMAN SERVICES DOOR AUTO OPERATOR REPLACMENT	\$ 12,110.00	9/3/2025
Facilities and Fleet Management	THE EPOXY FLOOR COMPANY LLC	FIRING RANGE EPOXY FLOORING	\$ 28,800.00	9/3/2025
Library	THE LIBRARY CORPORATION	CLOUD HOST SOFTWARE	\$ 9,133.95	9/5/2025
Union County Water - Water & Wastewater	NET TECH INTEGRATION LLC	NET TECH, \$11,470, SERVER RACK STACK CABLES/SWITCH	\$ 11,470.00	9/5/2025
Sheriff's Office	THE ARTCRAFT GROUP INC	UCSO SRO PROMOTIONAL ITEMS	\$ 16,555.00	9/5/2025
Facilities and Fleet Management	MVIX USA INC	CANECREEK Mvix Standard Digital Signage System	\$ 680.00	9/8/2025
Facilities and Fleet Management	INTER TECHNOLOGIES CORPORATION	CANECREEK CAMP STORE DISPLAYS INSTALL	\$ 3,316.71	9/8/2025
Facilities and Fleet Management	TWIN TRANSMISSION	REPAIRS TO ASSET 04-20	\$ 6,485.00	9/8/2025
Union County Solid Waste	Noble Oil Services, Inc.	Used Petroleum and Oil filter Disposal-1 year renewal	\$ 10,000.00	9/8/2025
Union County Water - Water & Wastewater	FCX PERFORMANCE INC	FCX, \$16,257, TALLWOOD 3 WAY VALVE	\$ 16,257.00	9/8/2025
Union County Water - Water & Wastewater	CLEARWATER INC	CLEARWATER, \$19395, PORTER RIDGE PUMP REPLM	\$ 19,395.00	9/8/2025
Union County Water - Water & Wastewater	XYLEM WATER SOLUTIONS USA INC	XYLEM, \$29,999.99, 12M RAS PUMP REPLM	\$ 29,999.99	9/8/2025
Library	Bibliotheca, LLC	We wish to revise Contract 9540. During the contract review process, the Library was able to secure a lower contract price. The original contract was finalized at the initial price. We are entering this amendment to secure the contract at the updated and lower price. Contract price change: \$40,595.32 to \$32,260.45 for a savings of \$8,334.87. Both the original and updated quotes are attached.	\$ 32,260.45	9/8/2025

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Facilities and Fleet Management	Creech & Associates, PLLC	Architectural and Engineering services for the Union County Jail renovation	\$ 48,940.47	9/8/2025
Union County Solid Waste	Southern Environmental Solutions of the Carolinas, LLC	Electronic waste recycling-1 year renewal	\$ 100,000.00	9/8/2025
County Manager's Office	Colony Labs, Inc. d/b/a Scribe	"Pro" subscription of Scribe software for Strategy & Innovation (6 licenses) to capture web-based and desktop application screenshots & screen recording in order to create step-by-step guides for creating instructions and training guides for internal process and external resources for assisting customers navigating certain county processes.	\$ 864.00	9/10/2025
Sheriff's Office	BLACK CREEK INTEGRATED SYSTEMS CORP	VOLP GATEWAY DEVICE UCSO JAIL	\$ 1,176.14	9/10/2025
Human Resources	SOUTHERN PIEDMONT SUNSET SLUSH LLC	Treats at Employee Expo	\$ 1,800.00	9/10/2025
Register of Deeds	LOGAN SYSTEMS INC	Indexing and Records Management	\$ 4,264.00	9/10/2025
Sheriff's Office	MAGNET FORENSICS LLC	GRAYKEY LICENSE UCSO CSI DIGITAL LAB	\$ 8,000.00	9/10/2025
Union County Information Technology	Inter Technologies Corporation	Refresh of AV equipment at the UC Government Center's Conference Room 717 to replace outdated and faulty equipment.	\$ 8,258.09	9/10/2025
Public Communications	Granicus, LLC	This is to amend the agreement for developing the Economic Development website. The project now requires significantly more design and development time than originally scoped. The Granicus design and implementation team confirmed that the additional effort, particularly around customized design concepts, wireframes, and development of the content management system, is the primary driver for upgrading to a Specialty package sub site.	\$ 12,000.00	9/10/2025
SOIL CONSERVATION	HYATT LAND SURVEYING	Survey	\$ 12,000.00	9/10/2025
Economic Development	Chmura Economics & Analytics, LLC	Term: The Term of this Order Form shall commence on the Effective Date of this Order Form as set forth above and continue until the first anniversary of such date. Thereafter, this Order Form shall automatically renew for successive one (1) year Terms unless Client provides written notice to Chmura of its intention not to renew no less than thirty (30) days prior to the end of the then-current Term. Selection: Region +75 Miles and both widget addons for \$12,850 plus \$250/hour	\$ 12,850.00	9/10/2025
Union County Water - Water & Wastewater	Bio-Nomic Services, Inc.	Pre Rehabilitation inspection using CCTV of lines to be rehabilitated.	\$ 47,200.00	9/10/2025
Union County Water - Water & Wastewater	Bio-Nomic Services, Inc.	CIPP Lining Repairs in Crooked Creek near Lowes due to sewer main failure.	\$ 47,900.00	9/10/2025
Facilities and Fleet Management	S&ME, Inc.	Construction Materials Testing Services for Food Innovation Center	\$ 63,316.00	9/10/2025
Human Services - Community Support and Outreach	TRIO Community Meals, LLC	Senior nutrition frozen meal program	\$ 90,000.00	9/10/2025
Soil & Water Conservation	NC Department of Agriculture and Consumer Services	THIS AGREEMENT is made under the authority of Chapter 106, Article 75, of the North Carolina General Statutes, including N.C. Gen. Stat. § 106-906, titled "Cooperation between counties and State in forest protection and development," by and between the North Carolina Department of Agriculture and Consumer Services (hereinafter called the Department), party of the first part, and the Board of Commissioners of UNION COUNTY in the State of North Carolina (hereinafter called the Board), party of the	\$ 105,398.00	9/10/2025
Facilities and Fleet Management	Anticimex Carolinas, LLC	Amend contract #7772 and add pest control services at 108 W. Jefferson St.	\$ 1,620.00	9/11/2025
Union County Water - Planning & Resource Mgmt	CentralSquare Technologies, LLC	Research into integration between Lucity and NorthStar to look for optimizations	\$ 1,950.00	9/11/2025
Facilities and Fleet Management	Blue Skies Landscape & Design LLC	Enter into contract with Blue Skies Landscape and Design LLC for pond maintenance services. Services performed at the Operations Center for \$3,120 per year and at the Human Services building and Event Center for \$6,144 per year with a one-time clean-up fee of \$1600 for the Operations Center.	\$ 10,864.00	9/11/2025
Union County Water - Water & Wastewater	Bio-Nomic Services, Inc.	249.5 Feet of Manhole Rehab costing \$49,302.50.	\$ 49,302.50	9/11/2025
Facilities and Fleet Management	Terracon Consultants, Inc.	Terracon will provide field exploration, laboratory testing, and engineering for the UC Solid Waste Operation Center new building project.	\$ 8,900.00	9/12/2025
911 Communications	DAVENPORT GROUP	Radio Technician Laptops	\$ 5,878.00	9/15/2025
Union County Information Technology	ESCAPE VELOCITY HOLDINGS, INC.	BeyondTrust PRA Renewal	\$ 16,476.03	9/15/2025
Union County Water - Water & Wastewater	NET TECH INTEGRATION LLC	NET TECH, \$19,930, FORTIGATE FIREWALLS	\$ 19,930.00	9/15/2025
Union County Solid Waste	SETCO INC	Setco Tires, \$27,666.04, Solid tires for CAT938M	\$ 27,666.04	9/15/2025
Union County Water - Water & Wastewater	Univar Solutions USA Inc.	Contract for Ortho-Polyphosphate for the Yadkin River Water Treatment Plant.	\$ 40,000.00	9/15/2025

Contract Report
July - September 2025

Union County Water - Water & Wastewater	Waterguard, Inc.	Renew contract for purchase of Sodium Hypochlorite for the Yadkin River Water Treatment Plant.	\$ 60,000.00	9/15/2025
Union County Water - Business Operations	VERIZON WIRELESS	VERIZON, \$10,349.76, IPAD 10TH GEN	\$ 10,349.76	9/16/2025
Facilities and Fleet Management	Tecta America Carolinas LLC	Enter into contract with Tecta America Carolinas LLC for roofing preventative maintenance on multiple buildings for an annual total of \$12,000.00.	\$ 12,000.00	9/16/2025
Tax Administration - Revenue	Invoice Cloud, Inc.	First one-year renewal option- original contact #7837	\$ 500.00	9/17/2025
Facilities and Fleet Management	Anticimex Carolinas, LLC	Amend contract #7772 and add pest control services at the Yadkin WTP. Initial amount \$550 and monthly fee of \$250.00.	\$ 3,800.00	9/17/2025
		Contract with the Town of Wingate for Law Enforcement Services.		
		Four (4) Full-Time Deputy Sheriff Positions.		
		Second Quarter Implementation total cost for FY2026		
		Town of Wingate: \$392,356.09 Union County: \$43,595.12		
		Yearly Cost for Contract		
		Town of Wingate: \$523,141.45 Union County: \$58,126.83		
Sheriff's Office	Town of Wingate	Total Contract Cost will be ongoing, left total cost at \$0.00	\$ 1.00	9/18/2025
Facilities and Fleet Management	DAIKIN APPLIED AMERICAS INC.	MAIN LIBRARY CONDENSING COILS REPLACEMENT	\$ 7,650.00	9/18/2025
Union County Solid Waste	GREEN RESOURCE LLC	Green Resource, \$10,473, Hydroseed material	\$ 10,473.00	9/18/2025
Cooperative Extension	CROSS TECHNOLOGIES INC	Moisture Analyzer for Wheat	\$ 4,676.00	9/19/2025
Sheriff's Office	WEST CHATHAM WARNING DEVICES INC	CSI TAHOES UPFIT EQUIPMENT	\$ 5,020.00	9/19/2025
Sheriff's Office	DANA SAFETY SUPPLY	TAHOE PARTS LAST 3 2024-2025	\$ 5,994.12	9/19/2025
Board of Elections	EPIGNOSIS LLC	Online learning management system	\$ 6,464.80	9/19/2025
Board of Elections	HART INTERCIVIC INC	Paper ballots for municipal elections	\$ 13,969.50	9/19/2025
Facilities and Fleet Management	LAWRENCE COMPANIES LLC	TREE REMOVAL AT CHURCH AND HAYNES ST INTERSECTION	\$ 7,921.16	9/22/2025
Facilities and Fleet Management	REI ENGINEERS INC	HUMAN SERVICES MOISTURE INTRUSION ON 3RD FLOOR	\$ 11,260.00	9/22/2025
Union County Water - Business Operations	IRTH SOLUTIONS LLC	IRTH, \$18207, UTILISPHERE SUBSCRIPTION	\$ 18,207.00	9/22/2025
Union County Water - Business Operations	APPLEONE INC	APPLEONE, \$23,000, SARA SCHOLTENS	\$ 23,000.00	9/22/2025
Union County Water - Water & Wastewater	TROJAN TECHNOLOGIES CORP	TROJAN, \$29,936.41, LAMPS & ORINGS	\$ 29,936.41	9/22/2025
Union County Information Technology	TEGO DATA SYSTEMS LLC	InfusionPoints Renewal (Term:10/18/25-10/17/26)	\$ 55,200.00	9/22/2025
Facilities and Fleet Management	Little Diversified Architectural Consulting, Inc.	Architectural Services to complete an adaptive use study of the existing Jail and former Administrative building.	\$ 86,500.00	9/22/2025
Library	Alliance for Children	Union County Christmas Parade Entry for 2025.	\$ 60.00	9/23/2025
Fire Services	KNOX COMPANY	KnoxDock™, 8600 KEY P ROGRAMMER & RECHARGER W/USB	\$ 3,846.00	9/23/2025
Facilities and Fleet Management	SUMMIT TOPCO, LP	REPAIRS TO ASSET 15-22 -DEDUCTIBLE	\$ 5,000.00	9/23/2025
Union County Water - Business Operations	GOFORMZ, INC	GOFORMZ, \$5120, 12 MOS GF ADVANCED LICENSING 10EA	\$ 5,120.00	9/23/2025
Facilities and Fleet Management	STEPHENS OFFICE SYSTEMS INC	OFFICE PODS FOR PUBLIC COMMUNICATIONS	\$ 7,727.28	9/23/2025
Union County Water - Water & Wastewater	EJ USA INC	EAST JORDAN, \$8130, 10 -COMPOSITE SEWER COVERS	\$ 8,130.00	9/23/2025

Contract Report
July - September 2025

Union County Water - Water & Wastewater	PETE DUTY AND ASSOCIATES INC	PETE DUTY, \$9475, 2-GRINDER PUMPS	\$ 9,475.00	9/23/2025
Union County Water - Water & Wastewater	BROOKS SALES INC	BROOKS SALES, \$59,148.54, EXCAVATOR	\$ 59,148.54	9/23/2025
Sheriff's Office	LAWMEN'S DISTRIBUTION LLC	BULK VESTS ORDER UCSO	\$ 82,845.99	9/23/2025
Fire Services	KNOX COMPANY	KnoxDock / Knox eLock Core	\$ 121,023.95	9/24/2025
Facilities and Fleet Management	CDBM INC	ZONE 2 TOUCHDOWN OFFICE HVAC	\$ 5,808.21	9/26/2025
Facilities and Fleet Management	ALLISON FENCE CO INC	CROOKED CREEK GATE OPERATOR	\$ 6,291.00	9/26/2025
Facilities and Fleet Management	JAIME RODRIGUEZ	FARMERS MARKET 1ST FLOOR RENOVATIONS	\$ 9,770.00	9/26/2025
Facilities and Fleet Management	DRYS ENTERPRISE INC	JUDICIAL CENTER ROLL UP DOOR	\$ 13,200.00	9/26/2025
Union County Water - Water & Wastewater	Chemtrade Chemicals US LLC	Approve 3.74% price increase and renew contract for Ammonium Sulfate 40% and Aluminum Sulfate 48% for the Yadkin River Water Treatment Plant from 10/18/2025 to 4/17/2026. This is the fifth and final renewal under this contract.	\$ 117,000.00	9/26/2025
Facilities and Fleet Management	BAKER ROOFING COMPANY LLC	PROGRESS BUILDING LEAKING WINDOW REPAIRS	\$ 5,280.00	9/30/2025
Human Resources	The Benefit Company, Inc.	Performance of mandatory Affordable Care Act reporting to the IRS for the 2025 calendar year.	\$ 6,000.00	9/30/2025
County Attorney's Office	West Publishing Corporation d/b/a Thomson Reuters	3-year contract for West Complete which provides automatic shipments of updates and supplements to the print products, including but not limited to pocket parts, pamphlets, replacement volumes, or looseleaf pages.	\$ 9,818.64	9/30/2025
Finance	CAVANAUGH MACDONALD CONSULTING LLC	OPEB and LEOSA Actuarial Reports	\$ 13,370.00	9/30/2025
Human Services - Public Health	PFIZER INC	BLANKET PO FOR VACCINES	\$ 15,000.00	9/30/2025
Human Services - Public Health	GLAXOSMITHKLINE PHARMACEUTICALS	BLANKET PO FOR VACCINES	\$ 15,000.00	9/30/2025

Fixed Price Term Agreement Spend	
Friedman's Premiere DBA iPromo (Big Union County)	\$13,857.79
Unifirst Corporation	\$17,039.51



Union County, NC

Staff Report

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

File #: 25-646

Agenda Date: 10/20/2025

TITLE:

Wastewater Treatment Capacity - Monthly Update

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

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 September 2025 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 70.0%
- Percent of Actual + Permitted Flows = 89.1%
- Actual Flows (MGD) = 5.253
- Actual + Permitted Obligated Flows (MGD) = 6.682

Crooked Creek

- Percent of Actual Flows = 59.4%
- Percent of Actual + Permitted Flows = 88.7%
- Actual Flows (MGD) = 1.129
- Actual + Permitted Obligated Flows (MGD) = 1.686

Olde Sycamore

- Percent of Actual Flows = 26.0%
- Percent of Actual + Permitted Flows = 26.0%
- Actual Flows (MGD) = 0.039
- Actual + Permitted Obligated Flows (MGD) = 0.039

Tallwood

- Percent of Actual Flows = 44.0%
- Percent of Actual + Permitted Flows = 44.0%
- Actual Flows (MGD) = 0.022
- Actual + Permitted Obligated Flows (MGD) = 0.022

Grassy Branch

- Percent of Actual Flows = 86.0%
- Percent of Actual + Permitted Flows = 88.0%
- Actual Flows (MGD) = 0.043
- Actual + Permitted Obligated Flows (MGD) = 0.044

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 September 2025 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	5.253	70.0%	6.682	89.1%	0.4
Crooked Creek	1.9	1.129	59.4%	1.686	88.7%	1.0
Olde Sycamore	0.15	0.039	26.0%	0.039	26.0%	1.3
Tallwood	0.05	0.022	44.0%	0.022	44.0%	1.6
Grassy Branch	0.05	0.043	86.0%	0.044	88.0%	1.7

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	3	0.143
Engineering Plan Review	15	0.523
Sketch Plan Review	12	0.557
Totals	30	1.223

Crooked Creek WRF		
Backlog Type	Number of Projects	Requested Flow (MGD)
Approved – Permit Submittal Pending	4	0.078
Engineering Plan Review	5	0.197
Sketch Plan Review	6	0.120
Totals	15	0.395



Union County, NC

Staff Report

Union County Government
Center
500 North Main Street
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File #: 25-648

Agenda Date: 10/20/2025

TITLE:

South Piedmont Regional Autopsy Center - October 2025 Quarterly Report

INFORMATION CONTACT:

Stephanie Dudley, County Manager's Office, Business Manager, 704-292-2668

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This is the quarterly progress report on the operations of the South Piedmont Regional Autopsy Center (SPRAC).

FINANCIAL IMPACT:

None.

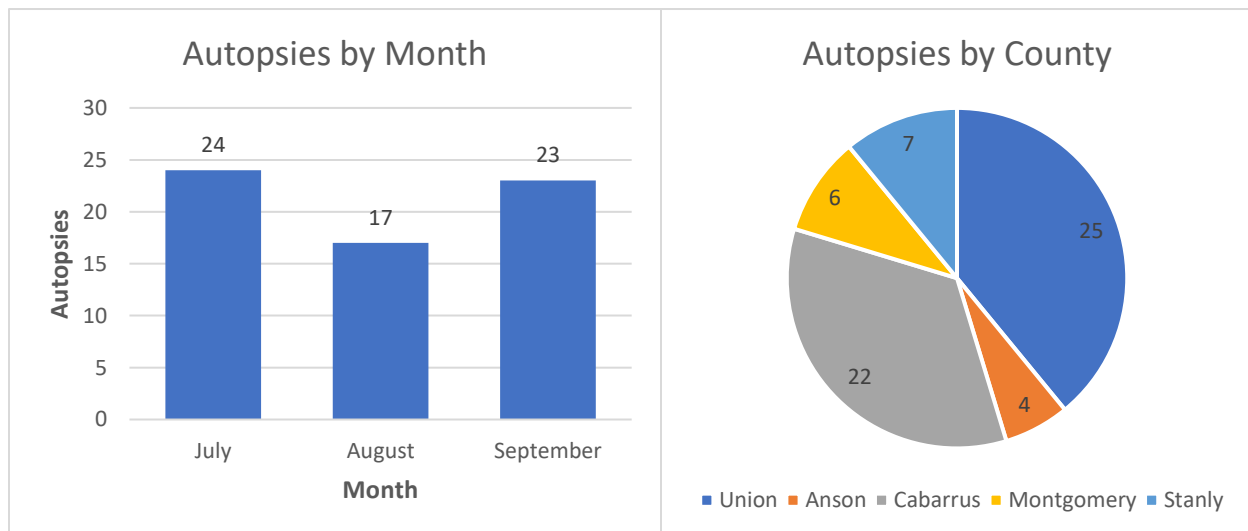
South Piedmont Regional Autopsy Center

October 2025 Quarterly Report

July 2025-September 2025

The South Piedmont Regional Autopsy Center (SPRAC) continues to perform autopsies at its temporary facility located at Atrium Health Union. Service expanded to include a fifth county, Stanly County, on July 1, 2025.

Between July 1, 2025, and September 30, 2025, a total of 64 autopsies were performed. Of those, 25 involved deaths in Union County, four in Anson County, 22 in Cabarrus County, six in Montgomery County and seven in Stanly County.



From July through September, 11 cases were connected to criminal investigations, including one related to a death by distribution charge. This figure is not comprehensive. While the Medical Examiner's Office works collaboratively with law enforcement, it conducts independent investigations and is not always notified when a criminal investigation occurs.

Planning continues for the permanent facility. The programming phase has been completed, and the project has advanced to the conceptual design phase. The facility is projected for completion in mid-fiscal year 2028.

SPRAC will continue to track caseload data and law enforcement involvement to guide planning and resource allocation. As operations continue to expand, this information will help ensure consistent service delivery and support long-term planning for the new facility.



Union County, NC

Staff Report

Union County Government
Center
500 North Main Street
Monroe, North Carolina
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File #: 25-626

Agenda Date: 10/20/2025

TITLE:

Consider a Step 4 Economic Development Incentive Grant to McGee Corporation (Project Canopy)

INFORMATION CONTACT:

Ron Mahle, Economic Development, Director, 980-476-5279

ACTION REQUESTED:

1) Award a Step 4 Economic Development Incentive Grant in an amount not to exceed \$696,000 over a 5-year period and 2) authorize the County Manager to a) negotiate and execute an agreement substantially consistent with this agenda item, b) exercise any renewal or extension term options set forth in the Agreement, and c) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

October 20, 2025, Regular Meeting, Agenda Item # 25-624 - Public Hearing Conducted.

BACKGROUND:

The Union County Economic Development Department started conversations with McGee Corporation under codename Project Canopy in late 2024 about the potential relocation of their manufacturing operation from Stallings, North Carolina, to a 60-acre parcel located off Goldmine Road. The company is considering the purchase of 60-acres, the construction of a 366,000 square foot manufacturing facility, and the purchase and installation of new production equipment. Total capital investment is approximately \$40,000,000.

McGee Corporation is a fourth-generation existing manufacturer located in Stallings, North Carolina. The company is an industry leader in the production of steel-frame canopy systems used at fueling stations and other custom architectural applications. Current employment at McGee Corporation is 163 people earning an average annual salary of \$63,000.

Due to exceptional growth in their business, they have outgrown the capacity at their current location and are searching for a site which will accommodate future growth.

Based on the anticipated capital investment, it is proposed that the Board award a STEP 4 Economic Development Incentive Grant in an amount-not-to-exceed \$696,000 paid over a 5-year period beginning in FY 2028. The value of the incentive grant will be based upon appraised value each year as appraised by the Union County Tax Administration Office. This grant is based on the company's projected investment of approximately \$40,000,000 in land, new building construction, and purchase and installation of new manufacturing equipment over the grant period, but not less than \$2,000,000. Based on its projected investment in Union County, the current tax rate, and assuming a consistent

assessed value with no depreciation, the company will pay estimated ad valorem taxes on the new taxable investment in the amount of \$868,400 over the grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.

The grant is also contingent upon the company retaining its current number of employees located within Union County.

FINANCIAL IMPACT:

The project, if brought to Union County, would have an economic development incentive grant in an amount-not-to-exceed \$696,000 but would generate approximately \$868,400 in ad valorem taxes over the 5-year grant period. Actual tax revenue for the County will be based on the assessed value of the investment each year by the Union County Tax Administration Office and will vary each year depending upon the depreciation schedule and the timing of the investments.



Union County, NC

Staff Report

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File #: 25-642

Agenda Date: 10/20/2025

TITLE:

Union County Land Preservation & Easement Program Update

INFORMATION CONTACT:

Alan Aldridge, Soil & Water Conservation, District Director, 704-233-1621 Ext. 3

ACTION REQUESTED:

1) Approve the allocation of funds, from Budget 10115410-5630-11115, for the purchase of Easements 90-2026-001, 90-2026-002, 90-2026-003, and 90-2026-004 in the amount of \$854,180; and 2) accept Easements 90-2026-001, 90-2026-002, 90-2026-003, and 90-2026-004 into the Union County Land Preservation & Easement Program.

PRIOR BOARD ACTIONS:

1) November 6, 2023, Regular Meeting, Agenda Item # 23-755 - a) Approved the Union County Soil & Water Conservation District to purchase and hold conservation easements for land preservation in Union County; and b) adopted Budget Amendment # 14 appropriating the County's General Fund unassigned fund balance in the amount of \$969,006 to be used for the purchase of conservation easements and associated transaction costs.
2) February 3, 2025, Regular Meeting, Agenda Item # 25-047 - a) Adopted the Union County land preservation & easement ordinance; b) approved the allocation of funds from BUDGET 10115410-5630-11115 for the purchase of Easement 90-2025-001 for the amount of \$721,575.00; c) accepted Easement 90-2025-001 into the Union County Land Preservation & Easement Program; d) accepted the donation of Easement 90-2025-002 into the Union County Land Preservation & Easement Program; e) adopted Budget Amendment 22 appropriating the County's General Fund unassigned fund balance in the amount of \$885,991.90 to be used for the purchase of conservation easements and associated transaction costs.

BACKGROUND:

Union County is currently ranked 13th in the United States for open space land loss on a per year basis according to the latest research published by the American Farmland Trust. Over the last four fiscal years, Union County has lost 3,191 acres (FY2020), 2,892 acres (FY2021), 3,625 acres (FY2022), and 2,419 acres (FY2023) from parcels enrolled in present use value (PUV) alone. According to the 2022 NCDA Census of Agriculture, Union County has 186,626 acres of farmland. In the Business-as-Usual scenario published by NC FarmLink, Union County is slated to lose 51,500 acres of current farmland by 2040. This scenario would represent approximately a 28% reduction in total farmland acreage in Union County by 2040.

The Union County Land Preservation & Easement program allows landowners to sell and/or donate the development rights to their property while still obtaining ownership of the land. By selling and/or

donating the development rights, open space and agricultural land will be preserved through conservation easements held by the Union County Soil & Water Conservation District. The District will be responsible for monitoring and inspections of easements to maintain compliance within the program. The use of present use value (PUV) rollback funds will provide financial resources to the Union County Soil & Water Conservation District for the easement purchases and all associated transaction costs. These funds are held in a Union County budget line and all non-encumbered funds will rollover at the end of each fiscal year.

FINANCIAL IMPACT:

\$854,180 for the purchase of Easements 90-2026-001, 90-2026-002, 90-2026-003, and 90-2026-004.