Union County, NC

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

Meeting Agenda

Monday, July 20, 2026
6:00 PM

Board Room, First Floor

Board of Commissioners

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

Closed Session - 5:15 PM

26-432 **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.
FINANCIAL IMPACT:
None.

Opening of Meeting - 6:00 PM

Invocation - Commissioner Errol Wedra

Pledge of Allegiance

Informal Comments

26-275 **America 250 Art Contest**

INFORMATION CONTACT:
Liz Cooper, Public Communications, Director, 704-283-3587
ACTION REQUESTED:
Recognize Winners of the America 250 Art Contest.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
The America 250 Student Art Contest is a countywide initiative designed to engage Union County students in celebrating the theme “America the Beautiful.” Inspired by the iconic song, the contest invited students in grades K-12 to explore and visually interpret what makes America meaningful to them, from sweeping national landscapes to local parks, neighborhoods, and personal spaces within Union County. The contest inspired creativity, civic pride and community connection while aligning with broader America 250 commemorative efforts.

Submissions were collected from May 8 to June 18 at multiple County

locations, including libraries and government facilities, before being reviewed by a panel of local artists selected by the Union County Community Arts Council.

Ultimately, County residents voted on the finalists through our engagement platform, Union County Engage. The nine “People’s Choice” winners will be formally recognized in partnership with the Arts Council. This presentation honors student achievement and demonstrates the County’s commitment to community engagement, youth involvement and creative expression as part of America 250.

Following recognition by the Board of County Commissioners, winning artwork will be displayed in the Government Center lobby through August.

FINANCIAL IMPACT:

None.

Public Hearing(s)

26-386 **Public Hearing - Union County Jail 2026 Bond Referendum**

INFORMATION CONTACT:

John Buchanan, Finance, Assistant Finance Director, 704-283-3523; Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

Conduct Public Hearing for Union County Jail 2026 Bond Referendum.

PRIOR BOARD ACTIONS:

1) June 16, 2026, Regular Meeting, Agenda Item #26-329 - The Board Introduced Bond Order Authorizing the Issuance $200,000,000 General Obligation Jail Bonds of the County of Union, North Carolina and Adopted Resolution of the County of Union, North Carolina Regarding Bond Order Authorizing the Issuance of General Obligation Jail Bonds, Setting Public Hearing Thereon and Directing Publication of Notice of Said Public Hearing.

2) May 18, 2026, Regular Meeting, Agenda Item #26-266 - The Board Adopted Resolution of the Board of Commissioners of the County of Union, North Carolina Directing the Publication of Notice of Intention to Apply to the Local Government Commission for approval of $200,000,000 General Obligation Jail Bonds and Adopted Resolution Making Certain Statements of Facts Concerning the Proposed Jail Bond Issue and Authorizing the Application to the Local Government Commission for $200,000,000 of General Obligation Jail Bonds.

3) April 20, 2026, Regular Meeting, Agenda Item #26-212 - The Board authorized staff to move forward with the necessary steps for a 2026 Bond Referendum to fund a new jail facility in the amount of $200,000,000.

BACKGROUND:

General Obligations Bonds (GO) are widely considered the lowest-interest, most cost-effective financing mechanism for long-term

capital projects in North Carolina due to the pledge of the local government's full faith, credit, and taxing power. For North Carolina counties, which are legally required to provide secure, safe, and sanitary inmate housing, financing a jail through a GO bond ensures that the borrowing costs are minimized for the taxpayers, as these bonds typically secure better credit ratings than other debt options. The GO bond process is more rigorous than other financing options (requiring a public vote), however the interest savings from a GO bond make it the preferred tool for construction of a new jail.

FINANCIAL IMPACT:

The estimated cumulative cost over the life of the bond, using the highest interest rate of 5.344% charged for similar debt over the last twenty years is estimated at $312,224,000. The estimated maximum annual debt service payment is $20,688,000 beginning in FY 2028 and commencing in FY 2047. The annual estimated amount of property tax liability increases for each $100,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $31.10. The annual estimated amount of property tax liability increases for each $400,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $124.40 (based on 3.11¢ increase in the ad valorem property tax rate). These estimates are based on the legislative requirements of NC Session Law 2022-53 for bond referendums.

Consent Agenda

26-390 **Convey Law Enforcement Canine “Maverick”**

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Make a determination that the UCSO service animal, Maverick, is no longer needed for public service and 2) authorize the County Manager to negotiate and execute an agreement substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Sheriff’s Office has officially retired canine “Maverick,” a 6-year-old white English Labrador Retriever. “Maverick” served the Sheriff’s Office for five years, assigned to the School Safety Division. His training includes article searches, narcotics detection, and tracking.

Beyond his operational duties, “Maverick” was widely recognized for his community engagement. Alongside his handler, Deputy J. Dye, he regularly participated in school visits and community events, strengthening relationships between the Sheriff’s Office and the public.

Because “Maverick” is a highly trained working canine-not a typical household pet-the Sheriff’s Office must ensure he is placed in a home capable of managing his specialized training and behaviors. The most appropriate and responsible placement is with his handler, Deputy J. Dye, who has worked with him throughout his service.

FINANCIAL IMPACT:

None.

26-391 **Grant Application - Department of Justice FY26 Technology and Equipment Program**

INFORMATION CONTACT:

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

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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Sheriff’s Office has been selected to receive a grant award from the U.S. Department of Justice, Office of Community Oriented Policing Services (COPS Office). This award provides 100% funding for the purchase of Rapid DNA Instrumentation for use within the Union County Sheriff’s Office Crime Lab. No County match is required.

The Sheriff’s Office will acquire a Rapid DNA system capable of producing a DNA profile in approximately 90 minutes, a significant improvement over current turnaround times at the North Carolina State Bureau of Investigation (SBI) Crime Lab, which continues to experience substantial backlogs. This technology, developed and approved under FBI guidance, is increasingly used by law enforcement agencies nationwide to support timely and accurate investigative decisions.

Rapid DNA instrumentation will be made available to law enforcement agencies within Union County’s jurisdiction. The system will enhance investigative capabilities by enabling quicker suspect identification, improving case clearance rates, and reducing reliance on overburdened state laboratory resources. Agencies across the country have demonstrated that Rapid DNA technology improves public safety outcomes, conserves investigative resources, assists in the apprehension of offenders, and helps exonerate individuals wrongly accused.

The adoption of Rapid DNA technology will directly benefit Union County residents. Crime affects individuals from all backgrounds, and the ability to rapidly process DNA evidence strengthens the Sheriff’s Office’s ability to protect victims, solve cases efficiently, and build community trust

through forensic-led investigations

The Rapid DNA Instrumentation grant is fully funded by the COPS Office, with no financial obligation to Union County.

FINANCIAL IMPACT:

None. The cost associated with the grant will be $861,000 with 100% funded by the federal grant (COPS Office).

26-421 **Grant Application - Department of Justice FY26 Bridging Immigration-Related Deficits Experienced Nationwide ("BIDEN") Program**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to submit the associated grant application for the DOJ FY26 BIDEN Program and to make all necessary assurances, certifications, and documentation required for submission in Grants.gov and JustGrants, as substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The U.S. Department of Justice has released the FY 2026 Bridging Immigration-Related Deficits Experienced Nationwide ("BIDEN") Program, a federal funding opportunity designed to support state and local governments in addressing criminal justice impacts associated with criminal illegal alien activity, drug trafficking networks, human trafficking operations, and transnational criminal organizations. The BIDEN Program, authorized under the BIDEN Reimbursement Fund (34 U.S.C. § 61101), provides funding across three categories: Hiring of sworn and non-sworn personnel, Technology and equipment, Construction or renovation of temporary detention facilities.

Eligible applicants must maintain or commit to entering a 287(g) partnership and must participate in Homeland Security Task Force (HSTF) operations or major DOJ enforcement efforts. The Union County Sheriff's Office meets these eligibility requirements.

The Sheriff's Office intends to apply under Category 2: Technology and Equipment to strengthen investigative, detention, transportation, and enforcement capabilities related to criminal illegal alien activity and trafficking operations.

Funding may support multi-year implementation, subscriptions, training, and maintenance of advanced technology and equipment that directly enhances operational capacity.

This grant opportunity is 100% federally funded and does not require a County match. Applications must be submitted first through Grants.gov (SF-424) and then through JustGrants, with Round 1 deadlines of July 15, 2026 (Grants.gov) and July 17, 2026 (JustGrants). Additional rounds will follow until funds are exhausted.

If awarded, the Sheriff's Office will return to the Board with any required budget amendments or acceptance actions.

FINANCIAL IMPACT:

The BIDEN Program provides 100% federal funding. Any award amount will be determined by DOJ following review of the application.

26-364 **Contract - 821 Zone 16-inch Transmission Main on Old Providence Road**

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Water Capital Improvement Program (CIP) includes an allocation for the design and construction of critical water supply and water transmission projects as outlined in the 2025 Water and Wastewater Master Plan. The 821 Zone Water Transmission Main on Old Providence Road project includes the design and construction of approximately 3,900 linear feet of 16-inch diameter water main along Old Providence Road between Highway 75 and Waxhaw Farms Road to provide adequate fire flow and improve pressure in the 821 Pressure Zone.

Ardurra Group North Carolina has been selected to provide engineering services for Task Order 8678-07: 821 Zone 16-inch Transmission Main on Old Providence Road. Ardurra Group North Carolina was chosen from a list of vendors previously selected from RFQ 2024-021 - Engineering Services for Water and Wastewater System Improvements to provide these services for Union County Projects.

FINANCIAL IMPACT:

The total cost of the Task Order 8678-07 with Ardurra Group North Carolina is $304,300.00. Sufficient funds are available within the adopted capital account 60184131 - 821 Zone Providence Road BPS Supply.

26-365 **Contract - Forest Park Gravity Sewer and Force Main Replacement Design**

INFORMATION CONTACT:
John Shutak, Union County Water, Engineering Director, 704-283-3651
ACTION REQUESTED:
Authorize the County Manager to 1) negotiate and execute an agreement 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:
July 14, 2025, Regular Meeting, Agenda Item # 25-436 - Approved Contract - Forest Park Pump Station Expansion - Force Main and Pump Station Evaluation - Task Order 8686-05.
BACKGROUND:
The Union County Water Capital Improvement Program (CIP) includes an allocation for the design and construction of upgrades to the Forest Park Pump Station and Force Main as identified in the 2025 Master Plan. The previously approved evaluation confirmed sizing requirements for the pump station, force main, and gravity sewer to increase the system peak capacity to 2.4 million gallons per day as recommended in the 2025 Master Plan. This task order provides design, permitting, and bidding services for the project upgrades consisting of approximately 2,200 linear feet of 12-inch gravity sewer and 4,000 linear feet of 12-inch sewer force main.

CDM Smith has been selected to provide engineering services for Task Order 8686-08 Forest Park - Gravity Sewer and Force Main Replacement Design. CDM Smith was chosen from a list of vendors previously selected from RFQ 2024-021 - Engineering Services for Water and Wastewater System Improvements to provide these services for Union County Projects.
FINANCIAL IMPACT:
The total cost of the Task Order 8686-08 with CDM Smith is $644,640.00. Sufficient funds are available in Capital Account Program 60185082 - Forest Park Pump Station, Force Main & Interceptor Improvements.

26-422 **City of Monroe Request to Provide Water and Sewer Service**

INFORMATION CONTACT:
John Shutak, Union County Water, Engineering Director, 704-283-3651
ACTION REQUESTED:
Approve the request from the City of Monroe to provide water and sewer

service to Parcels 09174012B and 09174006L (to be combined) located at 2830 Concord Hwy.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

City of Monroe recently received a request for outside city service located at 2830 Concord Hwy (see attached supporting documentation). Parcels 09147012B and 09174006L are to be combined and are requesting water and sewer to serve the proposed gas station on this property (2830 Concord Hwy currently has water service with the City of Monroe).

Union County does not have sanitary sewer in the area to serve the property.

The City of Monroe has indicated that they are prepared to serve the property with water and sewer, as outside City customers, if approval is granted from Union County. Our water and sewer service agreement with the City of Monroe prohibits the City from providing service outside the City limits without the expressed, written approval of the Board of County Commissioners.

Union County Water has no objection to the City providing water and sewer service to this property.

FINANCIAL IMPACT:

None.

26-424 **City of Monroe Request to Provide Water and Sewer Service**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the request from the City of Monroe to provide water and sewer service to Parcel 09102004 located along Village Lake Drive.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

City of Monroe recently received a request for outside city service located at Parcel 09102004 on Village Lake Drive (see attached supporting documentation).

The City of Monroe has indicated that they are prepared to serve the property with water and sewer, as outside City customers, if approval is granted from Union County. Our water and sewer service agreement with the City of Monroe prohibits the City from providing service outside the City limits without the expressed, written approval of the Board of County Commissioners.

Union County does not have infrastructure in the area to serve the

property. Union County Water has no objection to the City providing water and sewer service to this property.

FINANCIAL IMPACT:

None.

26-431 **Amendment 2 to Amendment 1 to Water and Wastewater Agreement with the City of Monroe**

INFORMATION CONTACT:

Amy McCaskill, Union County Water - Utility Business Services, Director, 704-283-3508

ACTION REQUESTED:

Authorize the County Manager to negotiate and execute and agreement substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

1) June 17, 2019, Regular Meeting, Agenda Item # 30 - Approved Amendment #1 to the Interlocal Agreement.
2) September 2, 2025, Regular Meeting, Agenda Item # 25-540 - Approved Amendment to Amendment 1 to the Interlocal Agreement.

BACKGROUND:

Union County and the City of Monroe entered into an agreement in 2005 for the provision of water supply and wastewater treatment services between the parties. Per the agreement, each party is responsible for its proportional share of capital improvements at the respective facilities.
In 2019, the interlocal agreement was updated. The 2019 amendment updated Exhibits 3, 4 & 5 to reflect the City's anticipated improvements at its wastewater treatment plant (WWTP) facility with an estimated cost of $5,305,370 and the County's improvements at the Catawba River Water Treatment Plant (CRWTP) with an estimated cost of $68,541,270. The County's proportional share of Monroe's WWTP improvements is approximately $1,351,808, while the City's proportional share of the County's improvements at the CRWTP is approximately $3,790,332. Exhibit 6 was also updated to reflect a previous amount owed to the County by the City of Monroe for the relocation of a 42" water main along SC 5. The City had already paid their proportional share. This amendment also reflected changes in interconnects between the Monroe and Union County Water distribution systems.
The 2025 amendment (called Amendment to Amendment 1) updated Exhibit 3 to reflect the City's improvements at its WWTP facility with a cost of $6,257,518.65. The County's proportional share of Monroe's WWTP improvements is $1,594,465.81.
The current amendment (called Amendment 2 to Amendment 1) will update Exhibit 3 to reflect the City's improvements at its WWTP facility with a cost for 2026 projects of $2,192,000 and for 2027 projects of $9,390,000. The County's proportional share of these in improvements is $558,540 and $2,392,647, respectively. The City of Monroe's Council approved this "Amendment 2 to Amendment 1 of the Water and Wastewater Agreement" at their June 9, 2026 meeting. The attached

document has been executed by the City Manager.

FINANCIAL IMPACT:

The amount for the projects starting in 2026 has been budgeted for in the FY2027 budget. The amount for the projects starting in 2027 will be subject to budget appropriation in years FY28 through FY30.

26-392 **Resolution - Conveyance of Surplus Vehicle**

INFORMATION CONTACT:

Jon Williams, Emergency Services, Fire Marshal, 704-296-4296

ACTION REQUESTED:

Adopt Resolution Authorizing Conveyance of Certain Union County Surplus Property to New Salem Volunteer Fire Department.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

New Salem Volunteer Fire Department has requested vehicle 55-14, a 2014 Ford F-150 that was assigned to the Fire Marshal's Office. The Fire Marshal's Office has replaced the vehicle, and it is no longer in service. New Salem Volunteer Fire Department will use the vehicle to transport command staff for administrative tasks, training and emergency response. It would also be used to transport equipment to and from training and to tow their multiple response trailers.

In accordance with the notice requirements of N.C.G.S. 160A-280, public notice of this resolution was posted on July 9, 2026.

FINANCIAL IMPACT:

None.

26-394 **Grant Application - North Carolina 911 Board Grant**

INFORMATION CONTACT:

Caleb Brackett, Emergency Communication, Director, 704-283-3790

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 Emergency Communications Center is the primary 9-1-1 Public Safety Answering Point (PSAP) for Union County. The 911 Center receives all requests for assistance in emergency and non-emergency situations and notifies or dispatches the proper agency/agencies.

The North Carolina 911 Board provides operating funds to all the PSAPs in the state. They have a grant cycle for PSAPs to request additional funding for projects that align with the board's funding priorities. One of the funding priorities for the FY2027 grant cycle is the replacement of end-of-life equipment required for operation of the PSAP.

Union County currently has critical infrastructure that has been deemed end-of-life by the manufacturer. The equipment replacement cost is partially covered by the 911 Board's annual funding distribution, and the grant request would cover the remaining cost.

FINANCIAL IMPACT:

The grant request is for approximately $812,000. There is no match required for this grant.

26-395 **Union County Transportation Procedures Manual**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt the Union County Transportation Procedures Manual as presented.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Transportation (UCT) must comply with multiple regulations to receive Federal and State funding. The North Carolina Department of Transportation and the Federal Transit Administration audit the Transportation Department, including reviewing the policies and procedures maintained.

Due to the business's ever-changing nature, the Department of Transportation must constantly tweak the UCT Procedures Manual to ensure that it remains compliant and relevant.

Updates have been to the following sections:

- Section 1, Subsection: Driver Advisory Board
- Section 4, Subsection: Essential Driver Behaviors
- Section 5, Subsection: Vehicle Fueling and Records Management
- Appendices:
    - A - UCT Rider's Guide
    - C - Cash Handling Procedures
    - D - UCT Comment form
    - W - Customer Survey

FINANCIAL IMPACT:

None. However, if the manual is not approved, the County's Transportation system may potentially be in noncompliance with the FTA, which could result in financial penalties in upcoming Federal and State grant funding.

26-396 **Grant Application - Transportation FY2027 ConCPT Grant Application**

INFORMATION CONTACT:
Theresa Torres, Human Services Agency, Transportation Director, 704-283-3598
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 purpose of the ConCPT funding's coordination portion (CO) is to enhance coordination among NCDOT IMD grantees. Funding will be provided for coordination activities in which two or more public transportation grantees (including community colleges or universities) agree to establish formal relationships to maximize resources, achieve efficiencies, and improve access to public transportation. The primary goal of this ConCPT funding is to establish formal relationships between the participants for long-distance routes.

This funding will be used for both operating and capital expenses to cover coordination services with Anson County Transportation and CATS 74X. It will also be used to cover the cost of replacement tablets for our vehicles and a new Operations, Administrative, and Safety Management System that will replace the current Access system (HUB) used by transportation today.
FINANCIAL IMPACT:
A total of $266,000 in grant funds (if approved as submitted), which includes 100% of State share and a Local match of 0%.

26-398 **Contract - Daymark Recovery Services, Inc.**

INFORMATION CONTACT:
Janet Payne, Human Services Agency, Administrator, 704-296-4349
ACTION REQUESTED:
Authorize the County Manager to 1) negotiate and execute an agreement with Daymark Recovery Services, Inc. in the amount of $714,850.00, 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 at the County Manager's discretion.
PRIOR BOARD ACTIONS:
1) September 3, 2019, Regular Meeting, Agenda Item # 3 - Approval of original contract
2) June 15, 2020, Regular Meeting, Agenda Item # 12 - Approval of 1st

Amendment
3) August 16, 2021, Regular Meeting, Agenda Item # 15 - Approval of 2nd Amendment
4) September 19, 2022, Regular Meeting, Agenda Item # 22-660 - Approval of 3rd Amendment
5) August 14, 2023, Regular Meeting, Agenda Item # 23-528 - Approval of 4th Amendment
6) June 17, 2024, Regular Meeting, Agenda Item # 24-425 - Approval of New Contract #8989

BACKGROUND:

As part of a continued effort to ensure that the funding allocated for behavioral health services in Union County is directed to areas of priority, County staff have worked with Daymark Recovery Solutions, Inc. to establish a direct contract relationship. For many years, Union County has provided funding for local behavioral health services to community service providers. This new agreement, amounting to $714,850.00, with $60,000.00 coming directly from ABC taxes and the rest from County funds, will provide more direct oversight by the County to ensure that the locally allocated funds are managed as desired. Additionally, it will offer greater flexibility in addressing any issues that may arise, thus enhancing the effectiveness and responsiveness of the services provided.

FINANCIAL IMPACT:

Funding for this contract is included in the FY2027 Operating & Capital Budget adopted by the Board of County Commissioners.

26-399 **Contract Amendment - FY2027 74X CATS Express Bus Service**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to approve the Third Amendment to the Union County Regional Transit Services Agreement between the City of Charlotte and Union County.

PRIOR BOARD ACTIONS:

1) April 17, 2023, Regular Meeting, Agenda Item # 23-122 - Presentation of 74 Express Bus Service Partnership Update- Action cancel service
2) June 19, 2023, Regular Meeting, Agenda Item #23-387 - Presentation of 74 Express Bus Service Partnership Update-Action add back Indian Trail stop
3) February 5, 2024, Regular Meeting Agenda Item #24-070 - FY2024-Contract CATS Express Bus Service
4) July 15, 2024, Regular Meeting Agenda Item #24-476 - FY2025-Contract CATS Express Bus Service
5) July 14, 2025, Regular Meeting Agenda Item #25-431 - FY2026 - Contract CATS/MPTA Express Bus Service

BACKGROUND:

The Charlotte Area Transit System (CATS)/Metropolitan Public

Transportation Authority (MPTA) provides peak-hour weekday express bus service from Indian Trail to uptown Charlotte, based on terms set forth in a Regional Transit Services Agreement between the City of Charlotte/Metropolitan Public Transportation Authority (MPTA) and Union County. Prior to October 2023, the express bus included stops in both Monroe and Indian Trail. The service changed to include only stops in Indian Trail starting October 1, 2023. This contract amendment is the third of four potential one-year renewal extensions and will cover the period from July 1, 2026, to June 30, 2027.

Union County is obligated under this contract to pay a portion of the operating costs, including administrative expenses, which represent 50% of the net cost of service after deducting fare revenue. Union County's third amendment FY2027 ($121,613) will be paid $20,889 by Indian Trail, leaving $39,918 to be covered by budgeted County general funds, and the remaining 50% to be covered by Federal Transit Administration (FTA) Section 5307 urban transit grant funding.

FINANCIAL IMPACT:

A maximum of $121,613 in payments to CATS will be made. $20,889 will be paid by Indian Trail, leaving $39,918 to be covered by FY2027 budgeted general funds, and $60,807 will be reimbursed through Section 5307 grant funds.

26-423 **Budget Amendment - Funding to Build and Support Enhanced Community-Based Health Care Delivery to Improve the Health and Quality of Life for All North Carolinians**

INFORMATION CONTACT:

Traci Colley, Human Services Agency - Department of Public Health, Director, 704-296-4801

ACTION REQUESTED:

1) Recognize, receive, and appropriate $21,143.16 in Bringing Value Home Innovation Funding from Community Care of North Carolina, Inc. and 2) approve Budget Amendment #1.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Community Care of North Carolina, Inc. (CCNC) has awarded Union County Public Health, a one-time Bringing Value Home Innovation Funding grant in the amount of $21,143.16.

The purpose of this grant is to assist practices in identifying and executing plans that support CCNC's charitable mission to build and support enhanced community-based health care delivery systems to improve the health and quality of life for all North Carolinians. To remain consistent with this mission and CCNC's tax-exempt status, acceptable uses for these funds include but are not limited to:

- Activities that support expanding access to care such as open access scheduling

- Implementing practice-based solutions to reduce unnecessary Emergency Department and Inpatient Utilization and improve timely follow-up with patients after hospital utilization occurs
- Improving quality performance, particularly for targeted Medicaid PHP Quality Measures
- Employing new ways to engage unengaged patients
- Implementing Practice Innovations that align with CCNC's mission
- Grant funds may not be used for lobbying or partisan political activities.

FINANCIAL IMPACT:

The County is awarded $21,143.16 from Community Care of North Carolina, Inc. No County match is requested or required.

26-404 **Petition for Annexation and Rezoning**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to 1) sign the petition of annexation into the Town of Wingate and 2) sign and submit the application for rezoning.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County purchased approximately 38.35 acres of land in Wingate for the purposes of economic development. Parcels 09012003C, 09-012-010B, and 09-012-010D are located in the Town of Wingate's extraterritorial jurisdiction (ETJ) and are currently zoned RA-20. To support economic growth, create jobs, and attract new taxable investment, which is the highest and best use of this property, we are seeking to annex and rezone these parcels to a Conditional Light Industrial designation.

FINANCIAL IMPACT:

None.

26-406 **Purchase - Library Digital Materials**

INFORMATION CONTACT:

Nina Chaffin, Library, Director, 704-283-3561

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:

At the beginning of each fiscal year, the Library issues a purchase order to one of its primary material vendors, Overdrive, Inc. The Library then orders materials against this purchase order throughout the year. We have a contract (#4089) with Overdrive, Inc. for the digital platform, and all materials for this platform must come from Overdrive. The approval of this PO will enable the Library to commence its E-books, E-audiobooks, and E-magazine purchasing for the year so that there is no significant lapse in new materials for the public, as well as the digital platform fee. The Library has utilized the contractual services of Overdrive, Inc. for library materials since July, 2015. The vendor has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional twelve months.

FINANCIAL IMPACT:

The anticipated cost for the materials is $174,000 and is budgeted accordingly for FY 2027.

26-427 **Purchase - Library Print Materials**

INFORMATION CONTACT:

Nina Chaffin, Library, Director, 704-283-3561

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:

At the beginning of each fiscal year, the Library issues a purchase order to its primary materials vendor, Ingram Library Services. The Library then orders materials against this purchase order throughout the year. The Library's discounts have been negotiated by Mid Atlantic Library Alliance, Inc. (MALiA), a library consortium of which Union County is a member. The approval of this purchase will enable the Library to commence its book purchasing for the year so that there is no significant lapse in new materials for the public.

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 materials will be made using MALiA contract LVA-MAT-22-007, quoted by Ingram Library Services.

F-INANCIAL IMPACT:

The anticipated cost for the materials is $309,500 and is budgeted accordingly for FY 2027.

26-407 **Purchase - Dump Truck**

INFORMATION CONTACT:
Caleb Sinclair, Solid Waste, Director, 704-283-3576
ACTION REQUESTED:
Authorize the County Manager to 1) negotiate and execute an agreement substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.
PRIOR BOARD ACTIONS:
None
BACKGROUND:
This piece of equipment is necessary to fulfill our regulatory environmental compliance obligations with respect to NCDEQ Solid Waste Permit for cover material at the Union County Construction and Demolition Landfill facility.

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 2027 Peterbilt 567 Quad Dump Truck will be made using Sourcewell Contract #060920-PMC quoted by The Larson Group Peterbilt.

FINANCIAL IMPACT:
The anticipated cost for the 2027 Peterbilt 567 Quad Dump Truck is $272,391.40 and is budgeted accordingly for FY27.

26-418 **Union County Land Preservation and Easement Program**

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 90-2026-006, and 90-2026-007 in the amount of $545,785; and 2) accept Easements 90-2026-006, and 90-2026-007 into the Union County Land Preservation & Easement Program.
PRIOR BOARD ACTIONS:
None.
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:

$545,745 for the purchase of Easements 90-2026-006, and 90-2026-007.

26-438 **Grant Application - National 4-H Council Lead to Change Project**

INFORMATION CONTACT:

Andrew Baucom, Agricultural Services, Director, 704-283-3738

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:

Lead to Change is a community action planning platform and grant funding opportunity that supports individual teens, groups or clubs in bringing their ideas for change to life. Projects span topic areas from agriculture, civic engagement, healthy living, STEM, to leadership, sharing a common goal: empowering youth to identify community needs and lead positive change. The program fosters confidence, collaboration, and problem-solving skills in the next generation of Beyond Ready Leaders.

FINANCIAL IMPACT:

$2,000 grant funding to support Union County 4-H club programming.

26-348 **Contract Renewal - Microsoft Enterprise Agreement**

INFORMATION CONTACT:
Jon Amelio, Information Technology, Director, 704-283-3533
ACTION REQUESTED:
Authorize the County Manager to 1) negotiate and execute an agreement substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
This is the County's Enterprise Agreement Renewal for Microsoft. This contract covers all aspects of our Microsoft Cloud and on-premises environment, from user subscriptions to back-end server maintenance and SQL Server clustering.

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 Microsoft Software Enterprise Agreement will be made using North Carolina Statewide Term Contract #208C - Microsoft Enterprise Agreement Software, quoted by SHI Software International Corp.
FINANCIAL IMPACT:
The anticipated annual cost for this service is $822,138.75. Since this contract contains three-year term, a total of $2,466,416.25 is estimated to be spent. Funding is available in the adopted FY27 budget appropriation with future expenditures subject to annual BOCC budget appropriation.

26-442 **Purchase - Laptop and Desktop Computers**

INFORMATION CONTACT:
Jon Amelio, Information Technology, Director, 704-283-3533
ACTION REQUESTED:
Authorize the County Manager to 1) negotiate and execute an agreement substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
Union County IT is requesting approval to purchase 415 laptop/desktop units across county departments. This will serve to replace existing equipment that is at, or beyond, its useful lifecycle based on the County’s five-year technology replacement plan. The deployment plan is as follows: County-Wide: 265 units - Social Services: 150 units.

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 equipment will be made using North Carolina Statewide Term Contract #204A - Microcomputers, Peripherals, and Related Services, quoted by Davenport Group.

FINANCIAL IMPACT:

The anticipated cost for the computer equipment is $475,000 and is budgeted accordingly for FY27.

26-363 **Tax Bill Correction Report for May 2026**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the Tax Bill Correction Reports for May 2026.

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:

May Refund amount = $212.70

26-367 **May 2026 NCVTS Motor Vehicle Tax Report**

INFORMATION CONTACT:

Vann Harrell, Tax Administration, Tax Administrator, 704-283-3748; Kristen Foxworth, Tax Administration, Deputy Tax Administrator, 704-283-3591

ACTION REQUESTED:

Approve the May 2026 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

$3,439.84

26-409 **Tax Bill Correction Report for June 2026**

INFORMATION CONTACT:
Michael Thompson, Tax Administration, Deputy Tax Administrator, 704-283-3624

ACTION REQUESTED:
Approve the Tax Bill Correction Reports for June 2026.

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:
June Refund amount = $84,438.46

26-382 **Contract - Union County Food Innovation Center Natural Gas Main Extension Agreement**

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:
1) April 3, 2023, Regular Meeting, Agenda Item #23-195 - Public Hearing Held
2) April 3, 2023, Regular Meeting, Agenda Item #23-198 - Adopted Budget Amendment BA20 and CPO#344
3) May 1, 2023, Regular Meeting, Agenda Item #23-261 - Approved Construction Manager at Risk Construction Delivery Method
4) January 16, 2024, Regular Meeting, Agenda Item #24-045 - Approved Design Contract with CPL, adopted Budget Amendment BA21 and CPO#344A, and accepted State Grant Funding
5) June 17, 2024, Regular Meeting, Agenda Item #24-416 - Approved Construction Manager at Risk Preconstruction Services Agreement
6) June 17, 2024, Regular Meeting, Item #24-427 - Approved Resilient Food Systems Infrastructure Program Grant application
7) June 17, 2024, Regular Meeting, Agenda Item #24-428 - Approved

Golden Leaf Foundation Grant application
8) November 18, 2024, Regular Meeting, Agenda Item #24-769 - Approved NCDA Agriculture Development and Farmland Preservation Trust Fund Grant application
9) January 21, 2025, Regular Meeting, Agenda Item #25-021 - Approved design contract amendment with CPL
10) March 17, 2025, Regular Meeting, Agenda Item #25-128 - Approved grant application North Carolina Tobacco Trust Fund Commission
11) March 17, 2025, Regular Meeting, Agenda Item #25-129 - Approved executing documents related to Golden Leaf Foundation Grant award, adopted CPOs 288F, 344B, and 369A, Budget Amendment BA27
12) February 17, 2026, Regular Meeting, Agenda Item #26-105 - Authorized intergovernmental agreement with Wingate related to administering Food Innovation Center and Approved Guaranteed Maximum Price contract amendment.
13) March 13, 2026, Regular Meeting, Agenda Item #26-163 - Authorized the County Manager to submit a grant application with the North Carolina Manufacturing and Processing Initiative for an automated bottling system for the Food Innovation Center.

BACKGROUND:

The Union County Food Innovation Center is, as a concept, a Food Systems Strategic Initiative. In an effort to support Union County agricultural producers with a focus on creating a sustainable and all encompassing "Food System," the project is intended to accomplish the following:

- Generate markets for crops and protein-based products harvested within Union County
- Provide career opportunities in an area of the County that has fewer local prospects
- Enable educational partnerships and internships with Wingate University, South Piedmont Community College and John & Wales University
- Promote healthier eating by the residents of Union County
- Support organizations, such as Meals on Wheels, The Food Hub, and others that assist the County's at-risk population

The Food Innovation Center’s primary asset is the Kitchen which will be a multi-purpose facility to serve a dual mission. First, to support the farm community with raw product storage, packaging and/or preparation for wholesale. Secondly, to enable the public and small businesses who need value-added processing, cooking and final packaging which directly serves the consumer market. The proposed facility would house kitchen spaces, as well as freezer, refrigeration, and dry storage space to support raw food preparation and general food processing.

The Food Innovation Center does not currently have access to natural

gas service. To provide natural gas service to the facility, the City of Monroe must extend an existing natural gas main to the project site. Monroe has provided a cost estimate of $164,741.69 for the natural gas main extension.

FINANCIAL IMPACT:

Funding is available within the adopted Capital Account 40080187 to support the contract amount of $164,741.69.

26-384 **FY 2027 Capital Project Ordinances - General County, UCPS, and South Piedmont Community College**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt the following Capital Project Ordinances for FY 2027:

General Capital Project Ordinances

CPO 273C - Public Safety reduction
CPO 284E - GC Electrical Infrastructure reduction
CPO 288K - Jail Locks, Progress Building/UC Jail Replacement Window reduction
CPO 306F - DOT Projects
CPO 344E - UC Food & Innovation Center
CPO 349E - UC Jail Expansion Phase 1 reduction
CPO 368C - 2025 Critical Infrastructure Amendment
CPO387A - JC Temp Generator Connection reduction
CPO 390- UPS Infrastructure, AV Equipment, and Pictometry
CPO 391 - Annual R&R Funding
CPO 392 - Public Safety

UCPS Capital Project Ordinances for FY 2027

CPO 393 - General Capital

South Piedmont Community College (SPCC) Capital Project Ordinances for FY 2027

CPO 322A - Center for Entrepreneurship
CPO 363B - Tyson Driving Pad
CPO 394 - Modular Building for Faculty Offices
CPO395 - Education Building Design

PRIOR BOARD ACTIONS:

June 16, 2026, Regular Meeting, Agenda Item # 26-351- Board adopted the FY 2027 Operating and Capital Budget Ordinance and the associated tax rates and fees

BACKGROUND:

The FY 2027 Capital Project Ordinances (CPOs) presented for the Board's consideration provide the legal spending authority for capital projects included in the Fiscal Year 2027 Capital Improvement Program (CIP), which was adopted as part of the FY 2027 Annual Budget

Ordinance on June 16, 2025.
The FY 2027 CIP reflects the County's ongoing commitment to maintaining and enhancing public infrastructure, preserving the condition of County-owned facilities, ensuring the reliability and security of technology systems, sustaining public safety operations, and supporting the long-term service capacity of County partner agencies. Projects are organized across multiple program areas and range from recurring renewal and replacement investments to targeted major capital initiatives that advance County priorities.
These appropriations are funded entirely through existing resources, with no new debt issuance required for FY 2027. Funding sources include unassigned General Fund balance, unassigned Debt Fund balance, unallocated CIP Fund reserves, Union EMS Fund balance, and ongoing pay-go capital contributions from both the General Fund and the Education Fund in support of South Piedmont Community College.
Each CPO establishes the project title, total appropriation, and authorized revenue source for a single capital project or program. The individual ordinances are attached to this agenda item for the Board's review. Together, they constitute the full scope of capital spending authority being requested for Fiscal Year 2027.

FINANCIAL IMPACT:

Funding is included in the FY2027 Adopted Budget for all pay go capital funding (cash funded) projects. Unallocated CIP Funding is $3,171,220; Union EMS Fund Balance is $650,000; Pay Go Capital Funding in Education Fund for SPCC is $375,000; General Fund Debt Fund Balance is $610,852; General Fund Unassigned Fund Balance is $2,441,423. Funding for UCPS is Interfund Transfer for General Fund $19,281,471; Mis Revenue $1,063,347; State Public School Building R&R Funds $580,000. Funding for SPCC is $2,116,507 in 2025B Bond Premiums; 2025B GO Bond Interest is $789,000; Pay Go Capital is $2,631,875.

26-385 Contract - NC Administrative Office of the Courts

INFORMATION CONTACT:

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

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:

June 16, 2026, Regular Meeting, Agenda Item # 26-351 - Board adopted the FY 2027 Operating and Capital Budget Ordinance and the associated tax rates and fees.

BACKGROUND:

Union County has maintained an ongoing partnership with the District

Attorney's Office for the 30th Prosecutorial District to support the expeditious disposition of criminal cases involving threats to public safety, consistent with the authority provided under G.S. 7A-64 and G.S. 153A-212.1. This agreement reflects the County's continued commitment to public safety and the effective administration of justice within Union County.

The North Carolina Administrative Office of the Courts (NCAOC) has authorized the District Attorney to hire two Assistant District Attorneys (ADAs) under this arrangement to address the volume of cases involving pretrial jail population that have accumulated on the dockets of the 30th Prosecutorial District. The NCAOC Director has determined that an overwhelming public interest warrants the use of additional prosecutorial resources for the speedy disposition of cases involving a threat to public safety.

Under the proposed agreement, Union County will fund the full personnel and operating costs for both positions, with the NCAOC administering payroll and human resources services on behalf of the District Attorney. The positions will be employees of the District Attorney's Office and will work under the District Attorney's supervision. The agreement term runs from July 1, 2026 through June 30, 2027.

FINANCIAL IMPACT:

The anticipated annual cost for this service is $240,062 and is budgeted accordingly in FY 2027.

26-389 **FY 2027 Budget - Technical Adjustment to Add and Increase Commercial Site Plan Review Fee**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Board of County Commissioners approve the reinstatement and amendment of the commercial site plan review fees as presented, effective upon adoption of the amended fee schedule.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Commercial site plan review is a required element of the County's development review process for non-residential projects. These fees are assessed to recover a portion of the staff time and resources expended in reviewing commercial site plans submitted to the County for approval.

The fee structure distinguishes between smaller commercial sites (less than one acre) and larger sites (one or more acres), with the larger category incorporating a per-acre component to reflect the increased complexity and review time associated with larger projects.

Prior to the omission, the fee schedule established the following rates for commercial site plan review:

Category	Previous Fee
Less than 1 Acre	$300.00 per review

1+ Acres $300.00 plus $50.00 per acre (or portion thereof)

Proposed Action

Staff recommends the Board of County Commissioners approve an amendment to the non-residential review fee schedule to reinstate the commercial site plan review fee category and adopt the following updated fee structure, effective upon adoption:

Category	Proposed Fee
Less than 1 Acre	$400.00 per review
1+ Acres	$400.00 plus $50.00 per acre (or portion thereof)

The proposed base fee increase from $300 to $400 represents a 33% adjustment to the flat-rate component of the fee. The per-acre charge of $50.00 per acre (or portion thereof) for sites of one acre or more is unchanged. This adjustment more accurately reflects the current cost of the review services provided and brings the commercial site plan fees into better alignment with peer jurisdictions and the County's broader cost-recovery objectives.

FINANCIAL IMPACT:

Revenue generated from commercial site plan review fees is recorded in the General Fund. The fiscal impact will vary based on development activity; however, reinstatement and adjustment of this fee is expected to modestly improve cost recovery for Planning and Development Services operations. No additional appropriation is required.

26-397 **Update to the Union County Citizen Participation Plan**

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt the updated Union County Citizen Participation Plan and 2) authorize the County Manager to execute any documents necessary to implement the updated Citizen Participation Plan.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The U.S. Department of Housing and Urban Development (HUD) requires entitlement communities receiving Community Development Block Grant (CDBG) funds to maintain a Citizen Participation Plan in accordance with 24 CFR 91.105. The Citizen Participation Plan establishes the County’s policies and procedures for encouraging citizen participation in the development, review, and amendment of the Consolidated Plan, Annual Action Plans, applications for Section 108 Loan Guarantees, and Consolidated Annual Performance and Evaluation Reports (CAPER). Union County has prepared updates to the Citizen Participation Plan to ensure continued compliance with HUD regulations, including amendments effective July 16, 2021.

Notice of the updated Citizen Participation Plan was published on June

27, 2026. The required fifteen (15) day public comment period began June 29, 2026, and concludes on July 13, 2026. Copies of the updated Citizen Participation Plan were made available for public review at the Union County Government Center and on the County's website during the public comment period.
All comments received during the public review period will be considered prior to formal adoption of the updated Citizen Participation Plan by the Union County Board of Commissioners.

FINANCIAL IMPACT:

There is no direct financial impact associated with adoption of the updated Citizen Participation Plan.

26-413 **Grant Application - The Cannon Foundation**

INFORMATION CONTACT:

Jason May, Budget & 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:

Union County Human Services is pursuing a renovation project for the existing group home, which was previously used for other purposes. The group home will serve as a Crisis Stabilization Home for foster youth in Union and Cabarrus Counties, providing short-term housing and supportive services for youth in crisis while staff determine the most appropriate placement and/or treatment plan.
The goal of the project is to prevent foster youth from remaining in Social Services offices by offering a safe, structured environment where services can be quickly wrapped around them during periods of transition. This collaborative effort between Cabarrus County, Union County, Alexander Youth Network, Partners LME/MCO, and BCBS Healthy Blue Care Together represents an innovative, cross-system approach to addressing urgent placement needs. The home will include eight private bedrooms, and with 68% of project funding already secured through state grants, the County is currently working to obtain the remaining funds needed for completion.
The Cannon Foundation seeks to support human services, higher education, healthcare and community. The Cannon Foundation was established in 1943 by Charles A. Cannon, President and CEO of Cannon Mills Company. The Foundation continues his philanthropic legacy by funding capital and equipment projects for organizations across Mr. Cannon's home state of North Carolina.

FINANCIAL IMPACT:
The grant request will be for approximately $261,729. There is no match required for this grant.

26-420 **Grant Application - The Braswell Foundation**

INFORMATION CONTACT:
Jason May, Budget & 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:
Union County Human Services is pursuing a renovation project for the existing group home, which was previously used for other purposes. The group home will serve as a Crisis Stabilization Home for foster youth in Union and Cabarrus Counties, providing short-term housing and supportive services for youth in crisis while staff determine the most appropriate placement and/or treatment plan.
The goal of the project is to prevent foster youth from remaining in Social Services offices by offering a safe, structured environment where services can be quickly wrapped around them during periods of transition. This collaborative effort between Cabarrus County, Union County, Alexander Youth Network, Partners LME/MCO, and BCBS Healthy Blue Care Together represents an innovative, cross-system approach to addressing urgent placement needs. The home will include eight private bedrooms, and with 68% of project funding already secured through state grants, the County is currently working to obtain the remaining funds needed for completion.
The Braswell Foundation is a private family foundation based in Waxhaw, North Carolina that supports charitable and community-focused initiatives, primarily through grantmaking to local and regional nonprofit organizations.
FINANCIAL IMPACT:
The grant request will be for approximately $261,729. There is no match required for this grant.

26-387 **Union County Jail 2026 Bond Referendum Bond Order and Resolution Setting Bond Referendum**

INFORMATION CONTACT:
Beverly Liles, Finance, Director, 704-283-3675
ACTION REQUESTED:

1) Adopt Bond Order Authorizing the Issuance of $200,000,000 General Obligation Jail Bonds of the County of Union, North Carolina and 2) adopt the Resolution Setting a Special Bond Referendum and Directing the Publication of Notice of a Special Bond Referendum and Notification of the Union County Board of Elections.

PRIOR BOARD ACTIONS:

1) June 16, 2026, Regular Meeting, Agenda Item #26-329 - The Board introduced Bond Order Authorizing the Issuance $200,000,000 General Obligation Jail Bonds of the County of Union, North Carolina and adopted Resolution of the County of Union, North Carolina Regarding Bond Order Authorizing the Issuance of General Obligation Jail Bonds, Setting Public Hearing Thereon and Directing Publication of Notice of Said Public Hearing.

2) May 18, 2026, Regular Meeting, Agenda Item #26-266 - The Board adopted Resolution of the Board of Commissioners of the County of Union, North Carolina directing the Publication of Notice of Intention to apply to the Local Government Commission for approval of $200,000,000 General Obligation Jail Bonds and adopted resolution making Certain statements of facts concerning the proposed jail bond issue and authorizing the application to the Local Government Commission for $200,000,000 of general obligation jail bonds.

3) April 20, 2026, Regular Meeting, Agenda Item #26-212 - The Board authorized staff to move forward with the necessary steps for a 2026 Bond Referendum to fund a new jail facility in the amount of $200,000,000.

BACKGROUND:

General Obligations Bonds (GO) are widely considered the lowest-interest, most cost-effective financing mechanism for long-term capital projects in North Carolina due to the pledge of the local government's full faith, credit, and taxing power. For North Carolina counties, which are legally required to provide secure, safe, and sanitary inmate housing, financing a jail through a GO bond ensures that the borrowing costs are minimized for the taxpayers, as these bonds typically secure better credit ratings than other debt options. The GO bond process is more rigorous than other financing options (requiring a public vote), however the interest savings from a GO bond make it the preferred tool for construction of a new jail.

The Bond Order lays out the purpose of the general obligation bond referendum that will be placed on November 3, 2026, election ballot and the Resolution will set a Special Bond Referendum giving direction to the Board of Elections for the bond referendum.

FINANCIAL IMPACT:

The estimated cumulative cost over the life of the bond, using the highest interest rate of 5.344% charged for similar debt over the last twenty years is estimated at $312,224,000. The estimated maximum annual debt service payment is $20,688,000 beginning in FY 2028 and commencing in FY 2047. The annual estimated amount of property tax liability

increases for each $100,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $31.10. The annual estimated amount of property tax liability increases for each $400,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $124.40 (based on 3.11¢ increase in the ad valorem property tax rate). These estimates are based on the legislative requirements of NC Session Law 2022-53 for bond referendums.

26-388 **NC Department of Public Safety Juvenile Crime Prevention Council Revised Funding Plan FY 2026-2027**

INFORMATION CONTACT:
Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:
1) Adopt Revised JCPC County Funding Plan for FY 2026-2027 and 2) authorize the Finance Director to approve the grant agreements and documents related to such grant agreements during their term.

PRIOR BOARD ACTIONS:
June 16, 2026, Regular Meeting, Agenda Item # 26-323 - 1) Approved County Funding Allocation Plan, Annual Plan and Certification for FY 2026-2027, 2) authorized the Finance Director to approve the grant agreements and documents related to such grant agreements during their term, and 3) authorized the County Manager to appropriate JCPC Funding as approved in the funding plan by a County Manager's Budget Amendment in FY 2027.

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

Funding for JCPC programs is generally adopted in the State Budget and assigned to County programs by a formula grant. Normally, a county JCPC approves a budget for the upcoming fiscal year, which is then submitted to the North Carolina Department of Public Safety Juvenile Justice and Delinquency Prevention (the DJJ). The attached funding plan was developed and approved by the JCPC Board and represents the Board's plan for how the funds will be spent for the 2026-2027 fiscal year. This request will be included in the State's DJJ budget which is planned for 2026-2027.

The JCPC Board approved $476,439 for County programs for the 2026-2027 fiscal year. The Funding Plan allocates funding from the State to the following programs: Life Connections D-A-S-H Counseling Services $100,000, Transforming Youth Movement-Transforming Futures $125,000, Transforming Youth Movement- Union County Teen Court Program $40,790, Aspire Youth and Family Kids at Work $75,312, JCPC Administration $9,502, Arts Related Innovative Student Empowerment

(ARISE) Union-KRE8IVU $50,000, The Connection Center $45,835, and New Covenant Community Development Center - Next Step Youth Program $30,000.
The JCPC budget is normally approved as a "pass through" line item in the County budget, meaning that the amount approved by the State is received by the County and then used for the JCPC program.
Union County has not approved JCPC programs in line-item detail in the past; rather, the JCPC Board normally negotiates, approves, and monitors line-item detail within the amount of funds allocated to the program, and provides a recommended budget to Commissioners.
The Revised County Funding Plan is updating only the Local in Kind Cash Match for the NCCDC Next Step Youth Program and does require any County funding. This cash match is revenue received directly to NCCDC from other sources.

FINANCIAL IMPACT:

None.

26-393 **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 to the Union County Pay and Classification Plan:
   A) Adjust the pay grades for the following job classifications:
      i) Deputy Tax Administrator - Pay Grade S
      ii) Director, Utility Business Services - Pay Grade S
   B) Add the following job classifications and associated pay grades:
      i) Recovery Support Coordinator - Pay Grade K
      ii) Elections Program Supervisor - Pay Grade K

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.

26-414 **Resolution - Solid Waste Surplus Equipment Sale**

INFORMATION CONTACT:

Corey Brooks, Procurement & Contract Management, 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 his 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 July 23, 2026, at 10:00 AM and end August 6, 2026, at 10:00 AM as indicated on Attachment A. The equipment is to be picked up at 2125 Austin Chaney Road, Wingate, NC 28174 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 vehicle(s) within ten (10) business days from the time and date of issuance of the Buyer’s Certificate.
4. Payment must be made online though 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 $69,000. The revenue will be returned to the fund from which the asset came.

26-429 **Resolution - Surplus Vehicle Sale**

INFORMATION CONTACT:

Corey Brooks, Procurement & Contract Management, 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 July 23, 2026, at 9:00 AM and end August 6, 2026, 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.

UC Transportation

- (1) 2019 FORD E350 BUS
- (1) 2020 FORD E350 BUS
- (2) 2021 FORD E350 BUS

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 $35,000. The revenue will be returned to the fund from which the asset came.

26-401 **Minutes for Approval**

INFORMATION CONTACT:
Lynn G. West, Clerk to the Board, 704-283-3953
ACTION REQUESTED:
Approve minutes.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
Draft minutes have been provided to the Board for review and approval.
FINANCIAL IMPACT:
None.

Information Only

26-362 **Tax Refunds, Releases and Prorations Approved by Finance Officer**

INFORMATION CONTACT:
Beverly Liles, Finance, Director, 704-283-3675
ACTION REQUESTED:
None - Information Only.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
On September 8, 2020, the Board of Commissioners adopted a Resolution Delegating Authority for Tax Releases and Refunds of less than $100 to Union County's Finance Officer. The resolution and NC GS 105-381(b) require such refunds to be reported to the Board regarding actions taken on requests for releases or refunds. All such actions shall be recorded in the Board's minutes. NC GS 105-330.6 authorizes the tax collector to direct an order for a tax refund of prorated taxes to the county finance officer related to surrendering of registered motor vehicle plates. The finance officer shall issue a refund to the vehicle owner. The attached report is for May 2026 NCVTS releases and refunds less than $100 and prorations approved by the finance officer.
FINANCIAL IMPACT:
None.

26-366 **Tax Collector’s Departmental Report for May 2026**

INFORMATION CONTACT:
Kristen Foxworth, Tax Administration, Deputy Tax Administrator, 704-283-3591
ACTION REQUESTED:
None - Information Only.
PRIOR BOARD ACTIONS:
None.
BACKGROUND:
This report reflects the totals of all tax transactions within the Tax Collector’s Office for the month of May 2026 as required by NCGS 105-350(7).
FINANCIAL IMPACT:
None.

26-383 **Human Resources Reports for May 2026**

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

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

FINANCIAL IMPACT:

None.

26-410 **Drought Status - Update**

INFORMATION CONTACT:

Aubrey Lofton, Water, Planning & Resource Management Director, 704-296-4241

ACTION REQUESTED:

None

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Union County Water is closely following the current drought. Union County Water declared Stage 2 Drought Restrictions on May 15 to comply with the Catawba-Wateree Drought Management Advisory Group's status change based on the Low Inflow Protocol triggers. Attached are the updated Low Inflow Protocol triggers as of July 1, 2026 and the US Drought Monitor as of July 2, 2026.

FINANCIAL IMPACT:

None

26-416 **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 June 2026 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 68.9%
- Percent of Actual + Permitted Flows = 90.1%
- Actual Flows (MGD) = 5.168
- Actual + Permitted Obligated Flows (MGD) = 6.760

Crooked Creek

- Percent of Actual Flows = 64.4%
- Percent of Actual + Permitted Flows = 93.7%
- Actual Flows (MGD) = 1.223
- Actual + Permitted Obligated Flows (MGD) = 1.781

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 = 34.0%
- Percent of Actual + Permitted Flows = 34.0%
- Actual Flows (MGD) = 0.017
- Actual + Permitted Obligated Flows (MGD) = 0.017

Grassy Branch

- Percent of Actual Flows = 72.0%
- Percent of Actual + Permitted Flows = 74.0%
- Actual Flows (MGD) = 0.036
- Actual + Permitted Obligated Flows (MGD) = 0.037

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 June 2026 are summarized in the attached tables.

FINANCIAL IMPACT:
None

26-411 **Communications Monthly Report - June 2026**

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.

26-417 **South Piedmont Regional Autopsy Center - July 2026 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

26-368 **Rezoning Petition 2026-CZ-005 McAteer**

INFORMATION CONTACT:
Bjorn E. Hansen, Planning, Senior Planner - Long Range Planning, 704-283-3690
ACTION REQUESTED:
To make a decision on this rezoning petition, the Board of Commissioners can consider the following motions:

To *approve* the proposed amendment (the proposal is consistent with the current plan)
Motion
(i) Adopt the Ordinance Approving Revision to the Official Zoning Map of Union County, North Carolina, and (ii) adopt the consistency and reasonableness statement for approval.
To *deny* the proposed amendment (the proposal is inconsistent with the current plan)
Motion
(i) Deny rezoning petition CZ-2026-005 from Jeremy McAteer; and (ii) adopt the consistency and reasonableness statement for denial
PRIOR BOARD ACTIONS:
June 16, 2026, Regular Meeting, Agenda Item # 26-321 - Public Hearing Held
BACKGROUND:
This case is a request to rezone a 5.75 acre portion of a 17.21 acre parcel appearing on the tax map as tax parcel 09-384-013 located on South Rocky River Road from RA-40 to Light Industrial (LI) with

Conditions. The rezoning request is a conditional rezoning, and includes the following conditions:

1) Limited to approved site plan dated April 6, 2026
2) Uses limited to office, warehouse and construction equipment and material storage
3) 5.75 acre portion will be subdivided from parcel
4) Five-year vesting of development rights
5) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval

The Land Use Board unanimously recommended approval at its May 19, 2026 meeting, citing consistency with the Land Use Map and increased business opportunities.

A public hearing was conducted on June 16. No one spoke for or against the rezoning.

FINANCIAL IMPACT:

None.

26-369 **Rezoning Petition 2026-CZ-007 Beulah Church**

INFORMATION CONTACT:

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

ACTION REQUESTED:

To make a decision on this rezoning petition, the Board of Commissioners can consider the following motions.

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

Motion

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

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

Motion

(i) Deny rezoning petition CZ-2026-007 submitted by R. Dean Harrell; and (ii) adopt the consistency and reasonableness statement for denial

PRIOR BOARD ACTIONS:

June 16, 2026, Regular Meeting, Agenda Item # 26-321 - Public Hearing Held

BACKGROUND:

This case is a request to rezone a 3.21 acre parcel appearing on the tax map as tax parcel 06-042-001J located on Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions. The rezoning request is an amendment to an existing conditional rezoning on the site and includes the following amended conditions:

1) Hours of operation changed from 9:00 AM to 9:00 PM to 6:30 AM to

9:30 PM
2) Any required privacy fence will be made of solid material to reduce noise
3) Trash and recycling pickup will occur between 9:00 AM and 5:00 PM

The second and third conditions were added by the Land Use Board at its May 19, 2026 meeting as a response to resident concerns over noise. These additional conditions were agreed to by the applicant. The Land Use Board then recommended approval on a 7-0 vote, citing consistency with the land use map used in the initial rezoning and increased flexibility for the owner.

A public hearing was conducted on June 16, 2026. No one spoke for or against the rezoning, although one resident submitted written comments noting concerns that had been addressed with revised conditions.

FINANCIAL IMPACT:
None.

26-358 **Board Discussion on Public Schools Statutory Funding Formula**

INFORMATION CONTACT:
Brian Matthews, County Manager
ACTION REQUESTED:
Direct staff to contact Union County's delegation to request changes to the statutory funding formula for public schools
PRIOR BOARD ACTIONS:
None
BACKGROUND:
The Board of Commissioners requested that staff place this item on the agenda for discussion and provide direction to staff regarding this issue.
FINANCIAL IMPACT:
None

County Manager's Comments

Commissioners' Comments

Adjournment

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

File #: 26-432 **Agenda Date:** 7/20/2026

TITLE:

Closed Session

INFORMATION CONTACT:

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

ACTION REQUESTED:

Enter into Closed Session pursuant to NCGS 143-318.11.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

1) pursuant to G.S. 143-318.11(a)(1), to prevent the disclosure of information that is privileged or confidential pursuant to G.S.132-1.1(a); and
2) pursuant to G.S. 143-318.11(a)(3), to consult with an attorney in order to preserve the attorney-client privilege.

FINANCIAL IMPACT:

None.

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

File #: 26-275 **Agenda Date:** 7/20/2026

TITLE:

America 250 Art Contest

INFORMATION CONTACT:

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

ACTION REQUESTED:

Recognize Winners of the America 250 Art Contest.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The America 250 Student Art Contest is a countywide initiative designed to engage Union County students in celebrating the theme “America the Beautiful.” Inspired by the iconic song, the contest invited students in grades K-12 to explore and visually interpret what makes America meaningful to them, from sweeping national landscapes to local parks, neighborhoods, and personal spaces within Union County. The contest inspired creativity, civic pride and community connection while aligning with broader America 250 commemorative efforts.

Submissions were collected from May 8 to June 18 at multiple County locations, including libraries and government facilities, before being reviewed by a panel of local artists selected by the Union County Community Arts Council.

Ultimately, County residents voted on the finalists through our engagement platform, Union County Engage. The nine “People’s Choice” winners will be formally recognized in partnership with the Arts Council. This presentation honors student achievement and demonstrates the County’s commitment to community engagement, youth involvement and creative expression as part of America 250.

Following recognition by the Board of County Commissioners, winning artwork will be displayed in the Government Center lobby through August.

FINANCIAL IMPACT:

None.

File #: 26-386 **Agenda Date:** 7/20/2026

TITLE:

Public Hearing - Union County Jail 2026 Bond Referendum

INFORMATION CONTACT:

John Buchanan, Finance, Assistant Finance Director, 704-283-3523; Beverly Liles, Finance, Director, 704-283-3675

ACTION REQUESTED:

Conduct Public Hearing for Union County Jail 2026 Bond Referendum.

PRIOR BOARD ACTIONS:

1) June 16, 2026, Regular Meeting, Agenda Item #26-329 - The Board Introduced Bond Order Authorizing the Issuance $200,000,000 General Obligation Jail Bonds of the County of Union, North Carolina and Adopted Resolution of the County of Union, North Carolina Regarding Bond Order Authorizing the Issuance of General Obligation Jail Bonds, Setting Public Hearing Thereon and Directing Publication of Notice of Said Public Hearing.
2) May 18, 2026, Regular Meeting, Agenda Item #26-266 - The Board Adopted Resolution of the Board of Commissioners of the County of Union, North Carolina Directing the Publication of Notice of Intention to Apply to the Local Government Commission for approval of $200,000,000 General Obligation Jail Bonds and Adopted Resolution Making Certain Statements of Facts Concerning the Proposed Jail Bond Issue and Authorizing the Application to the Local Government Commission for $200,000,000 of General Obligation Jail Bonds.
3) April 20, 2026, Regular Meeting, Agenda Item #26-212 - The Board authorized staff to move forward with the necessary steps for a 2026 Bond Referendum to fund a new jail facility in the amount of $200,000,000.

BACKGROUND:

General Obligations Bonds (GO) are widely considered the lowest-interest, most cost-effective financing mechanism for long-term capital projects in North Carolina due to the pledge of the local government's full faith, credit, and taxing power. For North Carolina counties, which are legally required to provide secure, safe, and sanitary inmate housing, financing a jail through a GO bond ensures that the borrowing costs are minimized for the taxpayers, as these bonds typically secure better credit ratings than other debt options. The GO bond process is more rigorous than other financing options (requiring a public vote), however the interest savings from a GO bond make it the preferred tool for construction of a new jail.

FINANCIAL IMPACT:

The estimated cumulative cost over the life of the bond, using the highest interest rate of 5.344% charged for similar debt over the last twenty years is estimated at $312,224,000. The estimated

maximum annual debt service payment is $20,688,000 beginning in FY 2028 and commencing in FY 2047. The annual estimated amount of property tax liability increases for each $100,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $31.10. The annual estimated amount of property tax liability increases for each $400,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $124.40 (based on 3.11¢ increase in the ad valorem property tax rate). These estimates are based on the legislative requirements of NC Session Law 2022-53 for bond referendums.

AFFP

NOTICE OF PUBLIC HEARING BO

Affidavit of Publication

STATE OF NC } SS
COUNTY OF } Union

Kimberly Cook, being duly sworn, says:

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

July 08, 2026

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

SIGNED:

Kimberly Cook

Billing Clerk

Subscribed to and sworn to me this 8th day of July 2026.

Barbara M Daniels

Barbara M Daniels, Notary, Guilford , County, NC

My commission expires: March 06, 2027

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

00003753 71512123

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

NOTICE OF PUBLIC HEARING BOND ORDER AUTHORIZING THE ISSUANCE OF $200,000,000 GENERAL OBLIGATION JAIL BONDS OF THE COUNTY OF UNION, NORTH CAROLINA

WHEREAS, the Board of Commissioners of the County of Union, North Carolina (the "County") has ascertained and hereby determines that it is necessary to pay the capital costs of providing for the design, construction, furnishing and equipping of a new jail facility; and

WHEREAS, an application has been filed with the Secretary of the Local Government Commission of North Carolina requesting Local Government Commission approval of the General Obligation Jail Bonds hereinafter described as required by the Local Government Bond Act, and the Clerk to the Board of Commissioners has notified the Board of Commissioners that the application has been accepted for submission to the Local Government Commission.

NOW, THEREFORE, BE IT ORDERED by the Board of Commissioners of the County of Union, North Carolina, as follows:

Section 1. In order to raise the money required for the purposes described above, in addition to any funds which may be made available for such purpose from any other source, General Obligation Jail Bonds of the County are hereby authorized and will be issued pursuant to the Local Government Finance Act of North Carolina. The maximum aggregate principal amount of such General Obligation Jail Bonds authorized by this order will be $200,000,000.

Section 2. Taxes will be levied in an amount sufficient to pay the principal and interest of the General Obligation Jail Bonds.

Section 3. A sworn statement of the County's debt has been filed with the Clerk to the Board of Commissioners and is open to public inspection.

Section 4. This bond order will take effect when approved by the voters of the County at a referendum scheduled for November 3, 2026.

The foregoing order has been introduced and a sworn statement of debt has been filed under the Local Government Bond Act showing the appraised value of the County of Union, North Carolina to be $61,115,797,589 and the net debt thereof, including the proposed bonds, to be $601,412,000. The finance officer of the County of Union, North Carolina has filed a statement estimating that the total amount of interest that will be paid on the bonds over the expected term of the bonds, if issued, is $112,224,000. A tax is authorized to be levied to pay the principal of and interest on the bonds if they are issued. The finance officer has filed a statement estimating that a property tax increase of $0.0311 per $100.00 of assessed valuation will be required to provide sufficient funds to pay the principal and interest on the proposed bonds. These estimates are preliminary, are for general information purposes only, and may differ from the actual interest paid on the bonds or the actual property tax increases required to provide sufficient funds to pay the principal and interest on the bonds. Anyone who wishes to be heard on the questions of the validity of the bond order and the advisability of issuing the bonds may appear at a public hearing or an adjournment thereof to be held on July 20, 2026 at 6:00 p.m. or as soon thereafter as practicable, in the Union County Government Center, First Floor, Board Room, 500 North Main Street, Monroe, North Carolina.

/s/ Lynn West Clerk to the Board of Commissioners County of Union, North Carolina

July 8, 2026

File #: 26-390 **Agenda Date:** 7/20/2026

TITLE:

Convey Law Enforcement Canine “Maverick”

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Make a determination that the UCSO service animal, Maverick, is no longer needed for public service and 2) authorize the County Manager to negotiate and execute an agreement substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Sheriff’s Office has officially retired canine “Maverick,” a 6-year-old white English Labrador Retriever. “Maverick” served the Sheriff’s Office for five years, assigned to the School Safety Division. His training includes article searches, narcotics detection, and tracking.

Beyond his operational duties, “Maverick” was widely recognized for his community engagement. Alongside his handler, Deputy J. Dye, he regularly participated in school visits and community events, strengthening relationships between the Sheriff’s Office and the public.

Because “Maverick” is a highly trained working canine-not a typical household pet-the Sheriff’s Office must ensure he is placed in a home capable of managing his specialized training and behaviors. The most appropriate and responsible placement is with his handler, Deputy J. Dye, who has worked with him throughout his service.

FINANCIAL IMPACT:

None.

STATE OF NORTH CAROLINA

AGREEMENT

COUNTY OF UNION

THIS AGREEMENT is made and entered into as of _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina, whose address is 500 N. Main St., Monroe, NC 28112 ("Union"), and _____, whose address is _____ ("Officer").

W I T N E S S E T H

WHEREAS, the Union County Sheriff's Office currently owns a dog named Maverick used for sniffing for the presence of narcotics (the "dog"); and

WHEREAS, the Sheriff's Office now plans to retire the dog from service, and Union therefore considers the dog to be surplus property; and

WHEREAS, the Officer is employed with the Union County Sheriff's Office and Deputy Joshua Dye has worked as the dog's handler, and now wishes to purchase the dog from Union County.

WHEREAS, Union is authorized to sell the dog by private sale pursuant to North Carolina General Statues §§ 160A-266 and 160A-267.

NOW, THEREFORE, in consideration of the mutual covenants and agreements hereinafter set forth, the parties hereto do each contract and agree with the other as follows:

1. Union agrees to sell the dog to Officer for a cost of Zero Dollars ($0.00). Officer agrees that upon sale of the dog to Officer, Union shall have no further responsibility related to the dog's care, activities, or actions.

2. Officer agrees to protect, defend, indemnify and hold harmless Union County, its respective agents, officers and employees free and harmless from and against all losses, professional fees, damages, costs, and other expenses or liabilities of every kind and character arising out of relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of acts of the dog following its sale to Officer that are due, in whole or in part, to the negligence of the Officer.

3. Officer waives, releases and discharges Union County, its respective agents, officers and employees of and from any and all claims, damages, demands, costs, liability and causes of action whatsoever that may arise as a result of any acts of the dog following its sale to Officer, including but not limited to, any claims, causes of action, liability, damages, demands and costs related to loss of or injury to any of the Officer's persons or property. This waiver and release shall inure to the benefit of Union County, and shall bind the Officer along with his heirs, legal representatives, assigns and successors in interest.

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

ATTEST:

BY: _____
Lynn West, Clerk to the Board

UNION COUNTY

BY: _____
Brian Matthews, County Manager

WITNESS:

_____

BY: _____

BY: _____

Approved As to Legal Form _____

File #: 26-391 **Agenda Date:** 7/20/2026

TITLE:

Grant Application - Department of Justice FY26 Technology and Equipment Program

INFORMATION CONTACT:

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

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.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Sheriff's Office has been selected to receive a grant award from the U.S. Department of Justice, Office of Community Oriented Policing Services (COPS Office). This award provides 100% funding for the purchase of Rapid DNA Instrumentation for use within the Union County Sheriff's Office Crime Lab. No County match is required.

The Sheriff's Office will acquire a Rapid DNA system capable of producing a DNA profile in approximately 90 minutes, a significant improvement over current turnaround times at the North Carolina State Bureau of Investigation (SBI) Crime Lab, which continues to experience substantial backlogs. This technology, developed and approved under FBI guidance, is increasingly used by law enforcement agencies nationwide to support timely and accurate investigative decisions.

Rapid DNA instrumentation will be made available to law enforcement agencies within Union County's jurisdiction. The system will enhance investigative capabilities by enabling quicker suspect identification, improving case clearance rates, and reducing reliance on overburdened state laboratory resources. Agencies across the country have demonstrated that Rapid DNA technology improves public safety outcomes, conserves investigative resources, assists in the apprehension of offenders, and helps exonerate individuals wrongly accused.

The adoption of Rapid DNA technology will directly benefit Union County residents. Crime affects individuals from all backgrounds, and the ability to rapidly process DNA evidence strengthens the Sheriff's Office's ability to protect victims, solve cases efficiently, and build community trust through forensic led investigations

The Rapid DNA Instrumentation grant is fully funded by the COPS Office, with no financial obligation to Union County.

FINANCIAL IMPACT:

None. The cost associated with the grant will be $861,000 with 100% funded by the federal grant (COPS Office).

File #: 26-421 **Agenda Date:** 7/20/2026

TITLE:

Grant Application - Department of Justice FY26 Bridging Immigration-Related Deficits Experienced Nationwide (“BIDEN”) Program

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to submit the associated grant application for the DOJ FY26 BIDEN Program and to make all necessary assurances, certifications, and documentation required for submission in Grants.gov and JustGrants, as substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The U.S. Department of Justice has released the FY 2026 Bridging Immigration-Related Deficits Experienced Nationwide (“BIDEN”) Program, a federal funding opportunity designed to support state and local governments in addressing criminal justice impacts associated with criminal illegal alien activity, drug trafficking networks, human trafficking operations, and transnational criminal organizations. The BIDEN Program, authorized under the BIDEN Reimbursement Fund (34 U.S.C. § 61101), provides funding across three categories: Hiring of sworn and non-sworn personnel, Technology and equipment, Construction or renovation of temporary detention facilities.

Eligible applicants must maintain or commit to entering a 287(g) partnership and must participate in Homeland Security Task Force (HSTF) operations or major DOJ enforcement efforts. The Union County Sheriff’s Office meets these eligibility requirements.

The Sheriff’s Office intends to apply under Category 2: Technology and Equipment to strengthen investigative, detention, transportation, and enforcement capabilities related to criminal illegal alien activity and trafficking operations.

Funding may support multi-year implementation, subscriptions, training, and maintenance of advanced technology and equipment that directly enhances operational capacity.

This grant opportunity is 100% federally funded and does not require a County match. Applications must be submitted first through Grants.gov (SF-424) and then through JustGrants, with Round 1 deadlines of July 15, 2026 (Grants.gov) and July 17, 2026 (JustGrants). Additional rounds will follow until funds are exhausted.

If awarded, the Sheriff's Office will return to the Board with any required budget amendments or acceptance actions.

FINANCIAL IMPACT:

The BIDEN Program provides 100% federal funding. Any award amount will be determined by DOJ following review of the application.

OMB No. 1121-0329
Approval Expires 02/28/2027

DOJ FY 2026 Bridging Immigration-Related Deficits Experienced Nationwide ("BIDEN") Program

Grants.gov Funding Opportunity Number: O-BJA-2026-172641

Application Deadlines in Eastern Time (ET):

1: Complete SF-424 and Submit in Grants.gov: **July 15, 2026, by 11:59 p.m. ET**

2: Submit full application in JustGrants: **July 17, 2026, by 8:59 p.m. ET**

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1. BASIC INFORMATION

Purpose of the Funding

This is a notice of funding opportunity (NOFO) for the Department of Justice's (DOJ) FY 2026 Bridging Immigration-Related Deficits Experienced Nationwide (BIDEN) Program.

This program, authorized under the BIDEN Reimbursement Fund established by the One Big Beautiful Bill Act, Public Law 119-21, Title X, Subtitle A, Part II (codified at 34 U.S.C. § 61101), provides funding for grants to eligible States, State agencies, and units of local government and tribal governments, pursuant to their existing statutory authorities to support the seven statutory purposes outlined in 34 U.S.C. § 61101:

1. Locating and apprehending aliens who have committed a crime under federal, state, or local law, in addition to being unlawfully present in the United States (hereafter referred to as "criminal illegal aliens").
2. Collection and analysis of law enforcement investigative information within the United States to counter gang or other criminal activity.
3. Investigating and prosecuting (a) crimes committed by aliens within the United States; and (b) drug and human trafficking crimes committed within the United States.
4. Court operations related to the prosecution of (a) crimes committed by aliens; and (b) drug and human trafficking crimes.
5. Temporary criminal detention of aliens.
6. Transporting aliens described in paragraph (1) within the United States to locations related to the apprehension, detention, and prosecution of such aliens.
7. Vehicle maintenance, logistics, transportation, and other support provided to law enforcement agencies by a state agency to enhance the ability to locate and apprehend aliens who have committed crimes under federal, state, or local law, in addition to being unlawfully present in the United States.

Awards from this program should be used to support significant participation in and support of Homeland Security Task Force (HSTF) activities, and other DOJ efforts to combat gangs, cartels, and other violent crime.

This NOFO includes three funding categories:

Category 1: Hiring

- **Sworn and Non-Sworn Law Enforcement Personnel**—Funding can be used to hire or rehire full-time sworn career law enforcement officers/deputies and civilian/non-sworn personnel as outlined below:
    - Hire new full-time officers/deputies and full-time civilian/non-sworn personnel, including by filling existing officer/deputy vacancies that are no longer funded in your agency's budget.
    - Rehire full-time officers/deputies and full-time civilian/non-sworn personnel who have been laid off by any jurisdiction as a result of state, local, or Bureau

of Indian Affairs (BIA) budget reductions. The rehired officers/deputies must be rehired on or after the official award start date on the notice of award.
  - Rehire full-time officers/deputies and full-time civilian/non-sworn personnel who are (at the time of application) currently scheduled to be laid off by your jurisdiction on a specific future date as a result of state, local, or BIA budget reductions. Recipients will be required to continue funding the positions with local funding until the date(s) of the scheduled layoffs.

  Applicants may request funding for full-time officer/deputy salaries or a combination of officer and salaries of civilian/non-sworn. Funding will support salaries for up to three years of eligible positions to be expended within a five-year period of performance to accommodate time needed for recruitment and hiring.

- **Non-Law Enforcement Personnel**—Funding can be used for the hiring, retention, and training of critical personnel across the full continuum of criminal justice operations for the purposes cited above. Examples of personnel could include but need not be limited to the following: forensic, investigative, analytical; prosecution and legal support; corrections, detention, and custodial; and transportation, security, and operations logistics. Funding may not be used for co-responders, interpreters, or translators.

Category 2: Technology and Equipment—Funding can be used to purchase and support multi-year implementation, ongoing subscriptions, training, and maintenance of equipment and advanced technology to address critical resource gaps and enhance capacity to support criminal justice operations related to the purposes cited above.

Note: If you apply for and receive funding for Unmanned Arial Systems (UAS), body-worn cameras, body armor, and/or NIBIN machines, you will be required to submit equipment-specific certifications and other documentation as a condition of your award.

Category 3: Construction of Temporary Detention Facilities for Criminal Illegal Aliens—Funding can be used for the following:

- Major Construction Projects—Funding would support large-scale projects, including building temporary detention facilities to house criminal illegal aliens awaiting prosecution, immigration proceedings, or transfer to federal custody.
- Substantial Renovation/Expansion/Modernization—Funding would support the expansion or modernization/targeted improvement of existing facilities, including bolstering detention infrastructure through addition of housing units, or renovation of existing facilities to meet current detention standards and significantly enhance capacity and operational functionality for temporary detention of aliens who have committed a crime in addition to being unlawfully present in the United States.

Please see Appendix 2 for additional requirements and information for this category.

Note: For all categories, award structure and distribution details will be finalized following review of applications and assessment of anticipated needs giving rise to the

application for the purposes of this NOFO (as defined above), including operational challenges associated with criminal illegal alien activity, drug trafficking networks, human trafficking operations, and transnational criminal organizations. The Department anticipates making awards across all four categories with award sizes adjusted to jurisdictional need, population served, operational scope, and enforcement workload.

Funding Details

Announcement Type	Initial
Assistance Listing Number	16.076
Statutory Authority	Pub. L. No. 119-21, Sec. 100055 (codified at 34 U.S.C. § 61101)
Grants.gov Opportunity Number	O-BJA-2026-172641
Expected Total Amount of Funding	$3 billion
Anticipated Number of Awards	TBD
Award Type(s)	Grant or Cooperative Agreement
Anticipated Award Amount	Award amounts will be determined following review of applications.
Expected Award Period(s)	36–60 months starting on August 1, 2026

Key Dates and Times

NOFO Release Date	This NOFO will be released in multiple rounds. Applications will be accepted on a rolling basis until funds are no longer available. See below for the dates when each round will be released and the deadlines for application submission. Rounds may be added. Round 1 Release Date: June 15, 2026 • Grants.gov Deadline: 11:59 p.m. ET on July 15, 2026 • JustGrants Deadline: 8:59 p.m. ET on July 17, 2026 Round 2 Release Date: July 20, 2026 • Grants.gov Deadline: 11:59 p.m. ET on August 19, 2026 • JustGrants Deadline: 8:59 p.m. ET on August 21, 2026 Round 3 Release Date: August 24, 2026 • Grants.gov Deadline: 11:59 p.m. ET on September 23, 2026 • JustGrants Deadline: 8:59 p.m. ET on September 24, 2026
SAM.gov Registration/Renewal	Recommend beginning the process as soon as possible.
Anticipated Notification Date	Awards will be made on a rolling basis.

2. ELIGIBILITY

Eligible applicants for this funding opportunity are limited to government entities described below that have direct responsibility for carrying out criminal justice functions, including the investigation, prosecution, detention, corrections, transportation, and associated support activities (*see* Purpose of the Funding above).

Applicants must also have established and fully participate in a 287(g) partnership, or commit to entering into and fully participating in one. In addition, applicants must be fully participating in either HSTF operations or other major DOJ enforcement efforts, or commit to entering into and fully participating in those efforts.

Eligible applicants include:

- **Government Entities**
  - State governments
  - County governments
  - City or township governments
  - Special district governments
  - Native American Tribal governments (federally recognized)
  - Native American Tribal governments (other than federally recognized)
- **Other**
  - State agencies with law enforcement responsibilities
  - Units of Local Government

State Government Entities: For the purposes of this NOFO, "state" means any state of the United States, the District of Columbia, the Commonwealth of Puerto Rico, the U.S. Virgin Islands, Guam, American Samoa, and the Commonwealth of the Northern Mariana Islands.

Other Units of Local Government: For the purposes of this notice of funding opportunity, other units of local government include towns, boroughs, parishes, villages, or other general purpose political subdivisions of a state.

Additional Eligibility Factors

For sworn and non-sworn law enforcement personnel hiring, eligible applicants are limited to established and operational local, state, territorial, and tribal law enforcement agencies that have primary law enforcement authority for the jurisdiction served.[1]

Certifications: You must submit the following certifications. See Additional Application Components for how to submit.

In order to request a federal grant award under this program, an applicant that is a State or local government entity must submit a certification (using only the template provided in Appendix 1, entitled "Certification by the Chief Executive Officer (or senior official) of the Applicant Government." Tribal government entities and educational organizations (e.g., public or state-controlled institutions of higher education) are not required to submit this certification. This certification is a basic minimum requirement of this funding opportunity, such that applications from applicants that are required to submit it and fail to do so, will be denied.

Also, such applicants should anticipate that awards to state or local government entities under this NOFO will include an award condition addressing compliance with 8 U.S.C. 1373.

[1] Note: If funds under this program are to be used as part of a written contracting agreement for law enforcement services (e.g., a town that contracts with a neighboring sheriff's department to receive services), the agency wishing to receive law enforcement services must be the legal applicant in this application.

Letter of Support: All applicants must also provide a letter of support from DOJ or an alternative federal HSTF member certifying the applicant is currently or intends to participate in HSTF activities or major DOJ operations.

Award Condition (Notice): Awards under this funding opportunity will include a condition (the specific terms of which will govern the award) related to the future reimbursement of the costs associated with federal law enforcement intervention or assistance provided to reduce crime or public disorder. The condition will, generally speaking, require an award recipient to fulfill any such future reimbursement obligation(s) incurred in accordance with its terms.

Limit on Number of Applications: You may submit only one application and apply to multiple funding categories.

Cost Sharing (Match) Requirement: This NOFO does **not** require cost sharing (match).

3. PROGRAM DESCRIPTION

Statutory Authority

Pub. L. No. 119-21, Sec. 100055 (codified at 34 U.S.C. § 61101)

Agency Funding Priorities

In order to advance public safety and help meet its mission, DOJ priorities include:

(a) Directly supporting law enforcement operations (including immigration law enforcement operations);

(b) Combatting violent crime;

(c) Supporting services to American citizens;

(d) Protecting American children; and

(e) Supporting American victims of trafficking and sexual assault.

Unallowable Activities: The following are certain unallowable costs and certain activities that are out of the program scope and will not be funded.

1. Out of program scope is any program or activity, at any tier that, directly or indirectly, violates (or promotes or facilitates the violation of) federal immigration law (including 8 U.S.C. § 1373) or impedes or hinders the enforcement of federal immigration law—including by failing to comply with 8 U.S.C. § 1373, give access to DHS agents, or honor DHS requests and provide requested notice to DHS agents.
2. Out of program scope is any program or activity, at any tier that violates any applicable Federal civil rights or nondiscrimination law. This includes violations

that—(1) indirectly violate the law, including by promoting or facilitating violations; or (2) unlawfully favor individuals in any race or protected group, including on a majority or minority, or privileged or unprivileged, basis, within a given area, population, or sector.

3. As specified in the DOJ Grants Financial Guide, in Chapter 3.13 "Unallowable Costs" ("Legal Services for Aliens"), any obligations of funds, at any tier, under this award to provide (or to support the provision of) legal services to any removable alien or any alien otherwise unlawfully present in the United States shall be unallowable costs for purposes any award made under this notice, but the foregoing shall not be understood to apply: (1) to legal services to obtain protection orders for victims of crime; or (2) to immigration-related legal services that may be expressly authorized or required by any law, or any judicial ruling, governing or applicable to the award.

Goals and Objectives of This Funding Opportunity

Goal: Increase capacity to carry out location, apprehension, detention, investigation, prosecution, and other enforcement activities related to criminal illegal aliens and drug and/or human trafficking perpetrators

- **Objective 1:** Increase hiring and retention of existing staff across investigations, prosecutions, courts, detention, corrections, and transportation supporting criminal illegal alien-related and drug and//or human trafficking operations.
- **Objective 2:** Increase investigations and prosecutions of crimes by individuals unlawfully present and drug/human trafficking cases.
- **Objective 3:** Increase apprehensions by program-funded personnel.
- **Objective 4:** Increase law enforcement agencies' operational capabilities by providing equipment and technology that directly supports efforts to identify, locate, apprehend, investigate, detain, and transport criminal illegal aliens, drug trafficking suspects, human trafficking perpetrators
- **Objective 5:** Increase temporary detention capacity in connection with enforcement actions.

For a description of how awards under this NOFO will contribute to achieving these goals and objectives, see the Performance Reports section below.

Expected Outcomes

OJP expects recipients to submit deliverables and performance reports, as described below. Read the Application Resource Guide for more information. OJP will measure success by reviewing a recipient's submission of performance reports and data and the extent to which project implementation reflects progress toward the goals and objectives of this NOFO.

Deliverables
Read the Post-Award Requirements and Administration section for more information. Recipients will receive further guidance on post-award deliverables dependent on categories of funding awarded.

Performance Reports
OJP requires recipients to submit regular performance reports that demonstrate progress toward achieving Program Goals and Objectives. Read information on performance reporting. Recipients will receive further guidance on post-award reporting requirements.

4. APPLICATION CONTENTS AND FORMAT

Application Contents List

OJP will only consider applications that contain all required parts, which are marked ***Required*** below. Refer to the DOJ Grant Application Submission Checklist for application instructions.

Application Item	Submission Type
Step 1: Grants.gov	
Application for Federal Assistance: SF-424 ***Required***	Online Form
Step 2: JustGrants	
Standard Applicant Information ***Required***	Online Form
Proposal Abstract	Text Box
Data Requested With Application • Financial Management and System of Internal Controls Questionnaire (including Applicant Disclosure of High-Risk Status)	Online Form
Proposal Narrative ***Required***	Attachment
Budget ***Required***	Online Form
Other Budget/Financial Attachments • Indirect Cost Rate Agreement (if applicable) • Consultant Rate (if applicable) • Limitation on Use of Award Funds for Employee Compensation for Awards Over $250,000; Waiver (if applicable)	Attachment
Memorandum of Understanding (if applicable)	Attachment

Additional Application Components	Attachment
• Certification by the Chief Executive Officer (or senior official) of the Applicant Government **applicant state or local government entities only** ***Required*** • Letter of support from DOJ or an alternative federal HSTF member certifying the applicant is currently or intends to participate in HSTF activities or major DOJ operations. ***Required*** • Current organizational chart for all jurisdiction entities proposed to receive funding through this project (e.g., police department, sheriff's office, courts, jails, etc.) • Tribal Authorizing Resolution (if applicable)	

In addition to the items marked ***Required*** in the table above, the following are considered basic minimum requirement elements that are considered in the responsiveness review:

Standard Applicant Information *Required*

Review and edit as needed the information imported from the SF-424 submitted in Grants.gov. Add ZIP codes for areas affected by the project.

Proposal Abstract

In JustGrants, enter a proposal abstract (limited to 2,000 characters) summarizing the proposed project. As abstracts for funded projects are public, do not include any personally identifying information (e.g., staff names). The abstract should include the following information:

- The name of the applicant's proposed project.
- The purpose of the proposed project (i.e., what the project will do and why it is necessary).
- Where the project will take place (i.e., the service area, if applicable).
- Who will be served by the project (i.e., who will be helped or have their needs addressed by the project).
- What activities will be carried out to complete the project.
- The subrecipient(s)/partner organizations or entities, if known.
- Deliverables and expected outcomes (i.e., what the project will achieve).

View an example of a proposal abstract.

Data Requested with Application

Financial Management and System of Internal Controls Questionnaire (including Applicant Disclosure of High-Risk Status)
Review information on this questionnaire.

Proposal Narrative *Required*

Format of the Proposal Narrative
Submit the narrative as an attachment in JustGrants. The document should:

- Be double-spaced, using a standard 12-point size font
- Have no less than 1-inch margins
- Have numbered pages
- Not to exceed 20 pages.

Sections of the Proposal Narrative
The Proposal Narrative must include the four sections listed below. In each section, applicants must address the following.

1. Description of the Need (5% of application score): What critical issue or problem do you propose to address with this funding request? This section should describe the current conditions and challenges your jurisdiction is facing related to criminal justice operations, such as enforcement, investigations, prosecutions, drug and/or human trafficking associated with the "Purposes of the Funding", and describe the hiring and retention, equipment and technology, and/or transportation and detention resources needed to support those operations. Applicants should address the following:

Please include:

- A brief explanation of the need, gap, or issue to be addressed by the proposed project activities.
- Supporting information, data, or evidence to demonstrate the needs' existence, size, and impact on the target population and community.
- How the need relates to the purpose of the NOFO.

DOJ recognizes that jurisdictions vary widely in size, structure, and capacity. Applicants should describe their circumstances clearly and candidly, even where data may be limited.

2. Project Goals and Objectives (15% of application score): How will the proposed project activities address the need identified and address the purpose of the NOFO? Describe what the applicant intends to accomplish, including specific outcomes that will be achieved in support of the investigation and prosecution of fraud and other crimes committed by aliens and in support of the seven statutory purposes outlined in 34 U.S.C. § 61101. Please include:

- Project goals (goals are broad, visionary statements on what you hope to accomplish).

- Project objectives (objectives are specific outcomes you plan to achieve through project activities).
- How your project goals and objectives relate to the goals and objectives of the funding opportunity.

3. Project Design and Implementation (35% of application score): How will you implement project activities that meet the goals and objectives? Please include:

- What activities you will conduct to achieve the proposed goals and objectives.
- How you will deliver or complete those activities.
- When the activities will take place.
- What deliverables will be produced as part of the project.
- If you plan to use subrecipients to help conduct the project, please name them (if they are known) or describe how you will identify them. Please describe their role in conducting project activities.
- How will your jurisdiction advance its established 287(g) partnership, HSTF operations, or other DOJ activities through this award?
- What challenges do you anticipate in implementing project activities, and how do you plan to address them?

4. Capabilities and Competencies (30% of application score): What administrative and technical capacity and expertise do you bring to successfully complete this project? Please include:

- A short description of your capacity to deliver the proposed project activities and meet the post-award requirements, if funded. Describe your organization's capacity to manage federal funding, including fiscal, administration, and programmatic oversight.
- A description of projects or activities your organization has conducted, or is currently conducting, that demonstrates your ability to undertake the proposed project activities.
- A summary of relevant experience of team members with key responsibilities for implementing the project. A summary of the relevant experience, qualifications, and roles of key personnel who will implement or oversee the project, and any other personnel with significant responsibility for project execution.

Budget (15% of application score) *Required*

Use the Budget Detail Worksheet (Web-Based Form) to submit the budget. Read information on budget preparation and JustGrants Application Submission Training.

- List each cost needed to implement the project under the appropriate cost category.
- Clearly name and describe each cost.
- Show the computation of each cost (e.g., cost per unit, number of units, and total cost).

- Enter narrative, as needed, to explain the cost calculations and connection to your project goals, objectives, and activities.
- Include only costs that are reasonable, allocable, and necessary to implement the project. They must be allowable under the funding statute and agency requirements.[2]

Budget/Financial Attachments

- **Indirect Cost Rate Agreement (if applicable):** If the budget includes indirect costs calculated using a current, federally approved indirect cost rate, upload your indirect cost rate agreement. Read information about indirect costs.
- **Consultant Rate (if applicable):** Read information on limits to consultant rates and whether you need to request approval to exceed those limits.

  Limitation on Use of Award Funds for Employee Compensation for Awards Over $250,000; Waiver (if applicable): Read information on this limitation and to determine whether you need to submit a waiver.
  https://www.ojp.gov/funding/apply/ojp-grant-application-resource-guide

Memorandum of Understanding (MOU) and Supporting Documents

Attach a Memorandum of Understanding (MOU) or letter of intent between the applicant and each of the project partner(s). Read information on what to include in an MOU/letter of intent.

MOUs should be submitted as one separate attachment to the application. Unsigned draft MOUs may be submitted with the application, but you should describe in a cover page to the attachment why they are unsigned.

Additional Application Components

Attach these in JustGrants:

- **Tribal Authorizing Resolution (if applicable):** Read information on whether you may need to submit a Tribal Authorizing Resolution.
- **Additional Application Component Name:**
  - 1373 Certification signed by the Chief Executive Officer (or senior official) of the Applicant Government **applicant state or local government entities only** ***Required***
  - Letter of support from DOJ or an alternative federal HSTF member certifying the applicant is currently or intends to participate in HSTF activities or major DOJ operations. ***Required***
  - Current organizational chart for all jurisdiction entities proposed to receive funding through this project (e.g., police department, sheriff's office, courts, jails)

[2] See 2 C.F.R. Part 200, Subpart E and the DOJ Grants Financial Guide. Read information on unallowable costs that apply to all funding opportunities.

Disclosures and Assurances

Read the disclosures and assurances and complete them in JustGrants:

- Disclosure of Lobbying Activities
- Disclosure of Duplication in Cost Items (if applicable)
- DOJ Certified Standard Assurances
- DOJ Certifications
- Applicant Disclosure and Justification—DOJ High-Risk Grantees (if applicable)

5. SUBMISSION REQUIREMENTS AND DEADLINES

The DOJ Grant Application Submission Checklist provides instructions for how to submit your application by the deadlines. Executive Order (E.O.) 12372 (Intergovernmental Review of Federal Programs) does apply to this funding opportunity: read the Application Resource Guide for details. Read OJP's policy for applicants to request late submission due to technical difficulties, severe weather, or natural or manmade disasters.

6. APPLICATION REVIEW INFORMATION

The Application Resource Guide explains the responsiveness review, review criteria, and review and selection process, including risk review, and deciding official. Refer to the Application Contents List for all required application components and other basic minimum requirement elements that are considered in the responsiveness review. The Proposal Narrative and Budget sections of this NOFO indicates the weight of peer review criteria.

7. AWARD NOTICES

Read about the award notification process.

8. POST-AWARD REQUIREMENTS & ADMINISTRATION

Read the Application Resource Guide for more information about standard award terms and conditions, administrative and national policy requirements, and post-award reporting requirements.

9. QUESTIONS?

NOFO Contact	Name: OJP Response Center Phone: 800-851-3420 or 202-353-5556 (TTY for hearing-impaired callers only) Email: OJP.ResponseCenter@usdoj.gov Hours: 9:00 a.m.–5:00 p.m. ET, Monday–Friday
SAM.gov Help Desk	Website: sam.gov/help Hours: 8 a.m.–8 p.m. ET, Monday–Friday (closed federal holidays)
Grants.gov Help Desk	Phone: 800-518-4726 Email: support@grants.gov Website: grants.gov/support Hours: 24 hours a day, 7 days a week (closed federal holidays)
JustGrants Help Desk	Phone: 833-872-5175 Email: JustGrants.Support@usdoj.gov Hours: 7:00 a.m.–9:00 p.m. ET, Monday–Friday and 9:00 a.m.–5:00 p.m. ET on Saturday, Sunday, and federal holidays.

APPENDIX 1—CERTIFICATION

U.S. DEPARTMENT OF JUSTICE, OFFICE OF JUSTICE PROGRAMS

Certification by the Chief Executive Officer (or senior official) of the Applicant Government

On behalf of the applicant named below, and in support of its application, I certify under penalty of perjury to the Office of Justice Programs ("OJP"), U.S. Department of Justice ("USDOJ"), that all of the following are true and correct:

(1) I am the chief executive officer of the State or local government ("the jurisdiction") of which the applicant entity named below is a part (or a senior official of the jurisdiction, with the legal authority to bind the same), I have received appropriate legal advice as to this certification, and I have the authority to make this certification on my own behalf as chief executive officer (or senior official) and on behalf of the jurisdiction and the applicant entity. I understand that OJP will rely upon this certification as a material representation in any decision to make an award to the applicant entity.

(2) I have carefully reviewed (or have received pertinent legal advice concerning) 8 U.S.C. §§ 1373(a) & (b) and 1644, including the prohibitions on certain actions by State and local government entities, agencies, and officials regarding information on citizenship and immigration status.

(3) I (and the applicant entity) understand that, for purposes of this certification, the term "program or activity" means what it means under title VI of the Civil Rights Act of 1964 *(see* 42 U.S.C. § 2000d-4a), and that terms used in this certification that are defined in 8 U.S.C. § 1101 mean what they mean under that section 1101, except that the term "State" also shall include American Samoa *(cf.* 34 U.S.C. § 10251(a)(2)).

(4) I (and the applicant entity) assure that the applicant entity (and its officials and other personnel) will comply with 8 U.S.C. §§ 1373 and 1644 in any "program or activity" receiving federal financial assistance under any award made by OJP pursuant to this application. I further certify that any subrecipient (at any tier) of such federal financial assistance (and its officials and other personnel) will also comply with 8 U.S.C. §§ 1373 and 1644.

I acknowledge that a materially false, fictitious, or fraudulent statement (or concealment or omission of a material fact) in this certification, or in the application that it supports, may be the subject of criminal prosecution (including under 34 U.S.C. § 10271 or under 18 U.S.C. § 1001 or 1621, and may subject me and the applicant entity to civil penalties and administrative remedies for false claims or otherwise (including under 31 U.S.C. §§ 3729–3730 and §§ 3801–3812). I also acknowledge that OJP awards, including certifications provided in connection with such awards, are subject to review by USDOJ, including by OJP and by the USDOJ Office of the Inspector General.

Signature of Chief Executive Officer (or senior official) of the Applicant Government	Date of Certification
Printed Name of Chief Executive Officer (or senior official)	Title of Chief Executive Officer (or senior official)
Name of Applicant Government Entity	

APPENDIX 2—CATEGORY 4 ADDITIONAL INFORMATION

Key Program Requirements

All applicants must address the following requirements in their program narrative:

- **Legal Authority:** Demonstrate legal authority to undertake construction or renovation projects within their jurisdiction.
- **Site Control:** Provide documentation of site control through ownership or long-term lease agreement for proposed construction locations.
- **Code Compliance:** Ensure compliance with all applicable federal, state, and local building codes and regulations.
- **Construction Capacity:** Demonstrate organizational capacity to complete construction or renovation within the 60-month project period.
- **Facility Purpose:** Ensure that constructed or renovated facilities directly support one or more of the seven statutory purposes under 34 U.S.C. § 61101, including investigating and prosecuting drug trafficking offenses committed in the United States and investigating and prosecuting human trafficking offenses committed in the United States.
- **Operational Sustainability:** Demonstrate local capacity to operate and maintain facilities beyond the grant period.
- **Detention Capacity:** For applications proposing detention facility construction or expansion, specify how many new beds will be added.

Potential Environmental Impact

The National Environmental Policy Act (NEPA) of 1969 (Public Law No. 90-190, as amended; 42 U.S.C. § 4371, et seq.) established a national policy to promote the protection and enhancement of the environment. Any BJA grant recipient with a project involving construction, expansion, renovation, facility planning, site selection, site preparation, and security or facility upgrades must be in compliance with the NEPA requirements during the initiation of the project as part of its planning, site selection, and site preparation. The BJA grant recipient must assist BJA in completing the NEPA process prior to actual construction, expansion, renovation, or remodeling (including security upgrades).

Depending on a review of the project after an award is made, grant recipients may be asked to provide additional information, so BJA can determine if the project may be excluded from further NEPA review. Depending on the particular project, an environmental assessment (EA) may need to be conducted, to assess the environmental impacts of the proposed project/action. If an EA is required, BJA will provide this service free of charge. Applicants do not need to allocate funding for this process in their grant applications.

For more information regarding NEPA, please visit https://bja.ojp.gov/national-environmental-policy-act-nepa-guidance.

Build America, Buy America Requirements

Pursuant to the Build America, Buy America Act (Pub. L. No. 117-58, §§ 70901-52), certain qualifying infrastructure projects may be subject to additional procurement requirements.

Project Insurance

Construction and major renovation projects create unique insurance challenges, and property owners need to understand the obligations and responsibilities they assume when contracting with their preferred builders or contractors. It is best to consult with an experienced independent insurance agent to assess the scope of a construction project and determine which policy is best suited to protect the owner's interests. BJA will require proof of project insurance prior to releasing funds to commence the construction/renovation/expansion project.

Lease Agreements

If the awardee opts to enter into a lease agreement once the project is complete, the awardee must ensure that the federal interest(s) described in 2 C.F.R. 200.311 (Real property) are protected by the lease terms. These terms must ensure that the building will be used for the originally authorized purpose as long as needed by the awardee for that purpose, during which time the awardee must not dispose of or encumber its title or other interests. The terms also must protect the federal interest upon disposition of the property (i.e., disposition of the building is no longer needed by the awardee for an authorized purpose) by preserving the reasonable depreciated value of the building in order to compensate the federal awarding agency or otherwise preserve title to the building to be able to transfer title to the federal awarding agency.

When real property is no longer needed for the originally authorized purpose, the nonfederal entity must obtain disposition instructions from the federal awarding agency or pass-through entity. The instructions must provide for one of the following alternatives to ensure that the federal interest is protected under 2 C.F.R. 200.311:

1. Retain title after compensating the federal awarding agency.
2. Sell the property and compensate the federal awarding agency.
3. Transfer title to the federal awarding agency or to a third party designate that is approved by the federal awarding agency.

Real Property Requirement

In accordance with DOJ real property standards (2 C.F.R. §200.311), BJA will continue to monitor facility usage and capacity levels after the grant ends. BJA and OJP retain a financial interest in funding the acquisition or improvement of real property. To ensure that the intent of the funding statute or authority is met throughout the useful life of a facility, even after a grant closes, BJA will require the grantee to submit regular reports on the status of the real property in which OJP/BJA retain an interest. If a grantee ceases to need a grant- funded facility for the originally authorized purpose during its

useful life, the grantee is obligated to request property disposition instructions from OJP/BJA, pursuant to 2 C.F.R. §200.311 (c).

In order to protect OJP's interest, 2 C.F.R. § 200.330 requires the award recipient to report on the real property acquired or real-property improvements made under the award for as long as OJP's interest therein is retained. In keeping with the requirements set forth in the regulation, OJP must require a grantee to submit reports at least annually on the status of real property in which the federal government retains an interest, unless the federal interest in the real property extends 15 years or longer. For more information about OJP's real property reporting requirements, please visit https://bja.ojp.gov/funding/real-property.

The following information specific to this funding opportunity will help you develop your project budget:

Allowable and Unallowable Costs

Allowable costs include:

- All construction or renovation expenses
- Architectural, engineering, and design services
- Site preparation, utilities, and infrastructure upgrades
- Security systems and equipment installation
- Furniture, fixtures, and equipment necessary for facility operations
- Environmental review and permitting costs
- Project management and construction oversight costs
- Contingency funding (up to 10% of construction costs) for unforeseen conditions or changes

Unallowable costs include:

- Routine maintenance or repair of existing facilities that does not add capacity or functionality
- Renovation/construction projects that do not demonstrably enhance capabilities relating to and/or general-purpose office space not dedicated to, the Purposes of the Funding
- Residential housing
- Land acquisition costs (unless specifically approved in advance)

All successful applicants will be expected to produce the following deliverables:

- **Detailed architectural plans and engineering specifications** demonstrating project design, construction/renovation/modernization approach, and compliance with applicable codes and standards.
- **Construction or renovation/modernization timelines** with milestones, critical path activities, and realistic completion schedules.
- **Site control documentation** demonstrating ownership or long-term lease agreement for construction or renovation locations.

- **Quarterly construction/renovation/modernization progress reports** documenting project status, completed activities, expenditures, challenges encountered, and photographic documentation of construction progress.
- **Operational plans** describing how completed or renovated facilities will be used post-construction, including staffing plans, operational procedures, and integration with existing enforcement operations and trafficking investigations.
- **Sustainability plans** demonstrating local capacity to operate and maintain facilities beyond the grant period, including projected operational costs and identified funding sources.
- **Certificate of Occupancy** (if applicable) upon project completion.
- **Completed construction project checklist** as requested by BJA upon project completion.
- **Photographic documentation** of completed facilities demonstrating project completion and operational readiness.
- **Standard Form 429 (Real Property Status Report)** at grant closeout and annually thereafter for the property's useful life or until federal interest ends, as required by 2 C.F.R. 200.330.

File #: 26-364 **Agenda Date:** 7/20/2026

TITLE:

Contract - 821 Zone 16-inch Transmission Main on Old Providence Road

INFORMATION CONTACT:

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

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Union County Water Capital Improvement Program (CIP) includes an allocation for the design and construction of critical water supply and water transmission projects as outlined in the 2025 Water and Wastewater Master Plan. The 821 Zone Water Transmission Main on Old Providence Road project includes the design and construction of approximately 3,900 linear feet of 16-inch diameter water main along Old Providence Road between Highway 75 and Waxhaw Farms Road to provide adequate fire flow and improve pressure in the 821 Pressure Zone.

Ardurra Group North Carolina has been selected to provide engineering services for Task Order 8678 -07: 821 Zone 16-inch Transmission Main on Old Providence Road. Ardurra Group North Carolina was chosen from a list of vendors previously selected from RFQ 2024-021 - Engineering Services for Water and Wastewater System Improvements to provide these services for Union County Projects.

FINANCIAL IMPACT:

The total cost of the Task Order 8678-07 with Ardurra Group North Carolina is $304,300.00. Sufficient funds are available within the adopted capital account 60184131 - 821 Zone Providence Road BPS Supply.

APPENDIX

Exhibit A

TASK ORDER

This Task Order pertains to an Agreement by and between UNION COUNTY*("OWNER"), and W.K. DICKSON & CO., LLC. d/b/a Ardurra Group North Carolina (formerly known as W.K. Dickson & Co., Inc.) ("ENGINEER"), dated January 1, 2024, ("the Agreement"). ENGINEER shall perform services on the project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order shall supplement the Agreement as it pertains to the project described below.

*, NORTH CAROLINA

Int _____

TASK ORDER NUMBER: **8678-07**

RELATED RFQ NUMBER: **2024-021**

PROJECT NAME: **821 Zone 16-inch Transmission Main on Old Providence Road**

PART 1.0 PROJECT DESCRIPTION:

OWNER has requested ENGINEER to develop design plans and specifications for permitting and bidding of a 16-inch Transmission Main on Old Providence Road. The project consists of approximately 3,900 linear feet of new 16-inch water transmission main in order to improve pressures and fire flow in the 821 Zone. The proposed water mains will be installed primarily via traditional open-cut construction methods, with bore and jack methods as needed. The existing 6-inch water main will be abandoned in place and all water main connections, and service connections, and hydrants will be transferred over to the new 16-inch main. The plans will be created using available GIS information, available as-built information, strip SUE and topographic existing conditions survey. The proposed project limits have been determined by the OWNER and are represented in a GIS based map prepared and provided by the OWNER to the ENGINEER. The proposed water main runs from the intersection of Old Providence Rd. and Hwy 75 to Rogers Pond subdivision near the intersection of Old Providence Rd. and Waxhaw Farms Rd.

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

Basic Services will be performed in accordance with Section 2.1 to 2.55 of the Task Order, with such services supplemented as provided herein.

Project Management, Planning– The ENGINEER will perform project management and administration activities throughout the design of the project, including the following:

2.1 The ENGINEER will evaluate and coordinate the activities associated with the efficient execution of the project including project development and scoping;

2.2 The ENGINEER's Project Manager shall coordinate and oversee all project activity on a regular basis related to all administrative and technical aspects of the project. In particular, the Project Manager will supervise and direct all staff related to the technical components of the project including design, construction document preparation, and specification development. In addition, the Project Manager will provide ongoing QA/QC of each of the tasks associated with the project quality control reviews to assess conformance to project scope, design criteria, as well as the project budget and schedule;

2.3 The ENGINEER will conduct a kick-off meeting with the OWNER (in a format to be selected by the OWNER) to discuss the project goals and objectives, assess alternatives, and gather any additional reasonably available relevant data. The ENGINEER will prepare minutes from the kick-off meeting which will outline items discussed, available data/information, and additional items that may need to be obtained for evaluating existing conditions and /or routes, and initial schedule submittal;

2.4 The ENGINEER shall provide project schedule and financial tracking as follows:

- 2.4.1 The ENGINEER shall maintain a project schedule in a format acceptable to the OWNER. An updated schedule submittal will be provided to the OWNER upon request.
- 2.4.2 The ENGINEER shall maintain a project cost accounting system throughout the life of the Project.
- 2.4.3 The ENGINEER shall prepare monthly invoices for its services in a format acceptable to the OWNER.

2.5 The ENGINEER shall procure sub-consultants as necessary for the various disciplines associated with the project. Subconsultants shall provide technical oversight, review applicable submittals, and conduct inspections of the Work as needed. The following sub-consultants are anticipated to be utilized on this project:

- 2.5.1 Surveying – To provide field survey and topographic mapping, as necessary for the ENGINEER's design purposes.
- 2.5.2 Subsurface Utility Engineering (SUE) – Level B SUE will be conducted in a manner consistent with the scope of work and procedure for the identification and mapping of existing underground utilities within the project corridor, in accordance with the current publication of CI/ASCE 38 "Standard Guidelines for Investigating and Documenting Existing Utilities".
- 2.5.3 Services of Professional Surveyor and Subsurface Utility Engineering sub-consultants, as described above, shall be billed on an "Hourly Not to

B
Exceed" (HNTE), basis, as outlined in PART 6.0, below and Attachment ~~A~~, as referenced and incorporated herein. Int _____

2.6 If access to private property is required, the ENGINEER will notify the OWNER so that survey notification letters can be prepared and distributed. The OWNER will prepare and distribute survey notification letters.

Preliminary Engineering – The ENGINEER will provide preliminary (predesign) engineering services consisting of final scoping of the proposed project, development of initial opinions of probable construction cost, and discussions including meeting with the OWNER regarding the proposed project scope, extent, and intent. Preliminary Engineering is intended to further define the project requirements, deliverables, and schedule milestones, and shall include the following activities:

2.7 The ENGINEER will initiate a Right-of-Way Inquiry with NCDOT and use the resulting verification, together with available property deeds and boundary information, and North Carolina Case Law to evaluate the proposed alignment and anticipated easement needs.

2.8 The ENGINEER will send a qualified environmental scientist to visit the project site for a one-day field visit to conduct a preliminary evaluation and provide preliminary wetland and stream classification determination of initial field route of the waterline extension. The ENGINEER will notify the OWNER if wetland or stream impacts are anticipated and additional wetland, stream delineation, and surface survey services are expected, if necessary.

2.9 The ENGINEER will visit the project site to further review the proposed project scope and related project requirements. The ENGINEER will perform the initial field routing of the new waterline extension. The ENGINEER will conduct up to one (1) day of field investigation.

2.10 The ENGINEER will design a 16-inch transmission main in accordance with OWNER standards. The OWNER will provide the ENGINEER with the most current as-builts, GIS data, and hydrant flow test data, as is reasonably available for reference only. No transmission main sizing analysis or pipe size recommendations will be performed as part of this scope, as the size has been predetermined by the OWNER.

Field Survey and Base Mapping – The ENGINEER will provide a location survey of the proposed waterline extension corridor. The survey extents will be determined by the ENGINEER, depending upon the existing conditions and scope of work areas defined herein. The survey shall include sufficient data to produce a digital corridor base map with the location of all surface features, located underground utilities, existing site conditions and topographic information. SUE and Survey services rendered under this "Field Survey and Base Mapping" phase shall be provided on an HNTE basis, as described below and in Part 6.0 of this Task Order. The ENGINEER has budgeted for survey and SUE services for up to 3,900 linear feet of new water line. For areas not surveyed, base mapping shall be performed by the ENGINEER and shall

consist of available GIS base data from the OWNER to formulate sufficient data to produce a digital base map. The OWNER will provide the ENGINEER with the most current water & wastewater GIS data. The base mapping shall include the following:

2.11 Level B SUE – The ENGINEER's Subconsultant will provide Level B SUE service to be performed in accordance with the standards as set by the American Society of Civil Engineers (ASCE) in publication CI/ASCE 38 (current release) Standard Guidelines for the Collection and Depiction of Existing Subsurface Utility Data.

2.12 The ENGINEER's sub-consultant will establish vertical and horizontal survey control using RTK GPS methods. Additional surveying control points will be established by conventional surveying methods.

2.12.1 Horizontal datum based on NAD 83 and the vertical datum will be based on NAVD 88. Utilizing project control, a baseline with inter-visible points will be established within the mapping limits of the project. The baseline points will have northing, easting, and elevation data.

2.13 The ENGINEER's subconsultant will perform a location survey of the proposed waterline corridor. The survey will include, but not be limited to, the storm drainage, fences, sidewalks, concrete structures, above ground appurtenances, buildings, signs, storm drains, trees over 10-inches in diameter, and spot elevations as needed, etc. within the existing road right-of way and proposed alignment.

2.14 The ENGINEER's subconsultant deliverables will feature contour intervals set at 1-ft.

2.15 The ENGINEER's sub-consultant will perform the following only for areas of the project corridor requiring easement mapping:

2.15.1 Conduct reconnaissance and locate existing property corners and evidence of property corners to perform existing right-of-way resolution using existing maps and deeds with the project area.

2.15.2 Online research for all maps and documentation needed to perpetuate existing property lines and existing rights of way. Additional Register of Deeds' Office research will be performed and documented as needed to resolve property lines that are not available online.

2.16 The ENGINEER's sub-consultant will provide a plan sheet showing field survey data suitable for the preparation of design plans.

Easement Exhibit – The project will be constructed, operated, and maintained in existing rights-of-way and easements, and where needed, new easements will be obtained. To assist with acquiring the new easements, the ENGINEER's professional survey subconsultant will prepare survey maps of the proposed new easements to be acquired.

To efficiently prepare the maps of the proposed easements, the OWNER and ENGINEER will work together as the project evolves and develops. The ENGINEER is not responsible for actually obtaining easements; rather, the OWNER is responsible for obtaining easements.

Upon completion of property deed research, the field surveying of the portions of the properties of the project area and the preliminary engineering of the Project, including the establishment of any underground utility locations, the ENGINEER will identify the potential locations of the easements required for the Project. The OWNER and ENGINEER will meet to review the preliminary engineering and potential easements. The OWNER and ENGINEER will determine if any changes will be needed to the project or the proposed easements. Upon the OWNER approving the easement needs and the ENGINEER receiving authorization from the OWNER to prepare the surveys of the potential easements, the ENGINEER's subconsultant will start the preparation of the surveys of the potential easement exhibits for the Project. The OWNER will compensate the ENGINEER for preparing the easement maps on a per-easement, unit cost basis, as described below and in Part 6.0 and Attachment ~~A~~ B of this TASK ORDER. If the number of required easements increases to more than the number included in this TASK ORDER, additional easements will need to be added to the TASK ORDER by amendment as an additional service.

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Utilizing the finalized design plans prepared by the ENGINEER's subconsultant, the ENGINEER will prepare and submit to the OWNER an easement map for each affected property for the use to begin obtaining the required easements for the Project. The ENGINEER's subconsultant will prepare the easement maps in accordance with the OWNER provided standards. The OWNER intends to acquire easements for any portion of the water main alignment not in the public right-of-way. Based upon preliminary review of the project area, and NCDOT Rights-of-Way, up to twenty-five (25) easement exhibits are planned and budgeted for herein. The general requirements for the easement maps shall be as follows:

2.17 Easement maps will comply with the rules set forth by the NC Board of Examiners for Engineers and Surveyors and the NC mapping law;

2.18 Easement maps will be an exhibit to the easement agreements to be prepared by the OWNER and will be prepared on 8.5"x11" sized paper. (8.5"x14" may be utilized if necessary based on scale/size of the subject parcel);

2.19 All easement maps shall have a general vicinity map, which shall clearly identify the general location of the parcels where the easement(s) shall be obtained;

2.20 All easement maps shall have distinct line types for the easement lines, which will define the easement(s) location(s) on each parcel;

2.21 The total square footage of each easement shall be indicated on the easement map(s);

2.22 All easement maps will identify the applicable jurisdictional boundaries;

2.23 Each parcel requiring an easement will be clearly identified with a parcel identification number for reference to the agreement to be prepared by the OWNER's attorney;

2.24 One digital copy in PDF format of the easement maps will be provided to the OWNER for use in obtaining the easements;

2.25 All easement plats shall be sealed by a Professionally Licensed Surveyor;

2.26 The OWNER will review the form and format of the proposed easement maps for compliance with the recording requirements at the county register of deeds;

2.27 The OWNER shall be responsible for negotiating the easements with property owners; and,

2.28 The OWNER, shall record the easement documents and return one (1) electronic (PDF) copy to the ENGINEER for our records.

Easement Staking: Staking (marking) of easement(s) by placing survey monuments or markers at intervals along easement lines in order to identify and visually represent location of easement lines. Easement staking will be to provide representation of easement lines for marking and/or negotiation purposes. This shall include marking of property corners and boundary lines adjacent and/or relevant to easement acquisition and/or negotiations. The ENGINEER has budgeted for a two-person crew to provide easement staking at an estimated rate of production of 150 linear feet of easement line per hour at a crew rate of $210 per hour. Based on this crew rate and estimated rate of production, ENGINEER has budgeted for 20 hours of crew time for the surveyor which would allow for the marking/staking of up to approximately 3,000 linear feet of easement line. This crew hourly rate and assumed number of hours establishes an hourly NTE budget of $4,200 for easement staking.

Engineering Design: Utilizing the field survey and mapping as well as information resulting from the preliminary design phase, the ENGINEER will design and prepare the drawing set(s) for the 16-inch transmission main in accordance with OWNER standards. The design includes abandonment of the existing 6-inch water main, and the transfer of all existing water main connections – including McCain Drive, Ethel Street, Arbor Drive, Essaw Drive, Yamasee Drive and Linda Kay Drive – along with associated service connections and new hydrants to the proposed 16-inch transmission main.

The ENGINEER will design the necessary reconnections, fittings, valves, hydrants, and appurtenances required to maintain system functionality and fire protection. For the connection at Linda Kay Drive, the design will include installation of a 16-inch by 6-inch tapping sleeve and valve on the new 16-inch water main, crossing Old Waxhaw Monroe Road, and transitioning to a 4-inch connection to tie into the existing water main, consistent with OWNER direction and the assumption that a future 6-inch water main will be sufficient to meet fire flow requirements for the neighborhood.

The ENGINEER will also prepare other contract documents necessary for subsequent phases (permitting and bidding, including, front end documents in the form of the OWNER provided EJCDC Sections, technical specifications, drawing set cover, notes, plan and details sheets, etc. Final design work shall include:

2.29 Prepare horizontal and vertical geometry;

2.30 Prepare plan and profile drawing sheets for proposed waterline extension, connections, and appurtenances. (horizontal scale of 1″ = 40′ and vertical scale of 1″ = 4′).

2.31 Prepare erosion control detail sheets.

2.32 Prepare construction contract documents including the OWNER provided standard front-end documents (EJCDC) as well as all required Federal, State, and the OWNER documents. The ENGINEER will develop any additional contract documents necessary for the project, for review and approval by the OWNER.

2.33 Prepare technical specifications suitable for permitting and construction.

2.34 Prepare quantities take off and opinion(s) of probable construction cost.

2.35 The ENGINEER shall provide the OWNER with monthly project design status memoranda, which will include schedule updates and serve to document the general progress of the final design. Memoranda shall outline any project specific challenges, conflicts, and/or circumstances that are hindering the progress in completing the design phase.

2.36 The ENGINEER shall submit 60% Design, and 90% Design progress sets for waterline extension, to the OWNER for review and comment. Electronic copies will be submitted via email. The ENGINEER's project schedule assumes up to 14 days for the OWNER to complete a review of each submittal and provide comments. Should the OWNER need additional time to complete their review beyond the 14 days allocated in the ENGINEER's schedule, the remaining project schedule milestones shall be extended to the equivalent number of days utilized by the OWNER to complete their review beyond the 14 days that are originally allocated.

2.37 The ENGINEER shall meet with the OWNER one (1) time for each review to discuss the draft submittal and comments resulting from the OWNER's review.

2.38 Upon subsequent submittals, the ENGINEER shall maintain and provide comments and response log to the OWNER.

2.39 Throughout the development of the design documents and concurrent with the OWNER review, the ENGINEER shall conduct a thorough internal QA/QC review in accordance with ENGINEER's policies and procedures for the deliverables outlined herein. The ENGINEER's QA/QC review program shall be completed prior to issuing final documents to the OWNER.

2.40 Finalize and submit design documents to the OWNER electronically (PDF), via e-mail.

2.41 Geotechnical investigation is not included. If horizontal direction drilling (HDD) is determined to be the most appropriate installation method, and a geotechnical investigation is deemed to be necessary, such services can be obtained as additional services.

Permitting: Based upon the OWNER's approval of the 90 percent design progress submittal, the ENGINEER will prepare and submit applications for permits to the applicable agencies necessary to allow for the construction of the project. The ENGINEER has budgeted for up to one (1) permit submittal. The ENGINEER shall be available to answer inquiries made by the various regulatory agencies during the reviews of the Project. Based on the ENGINEER's assessment of the project scope and requirements, the following permits are scoped:

2.42 NCDEQ- Public Water Supply Section – A Construction Permit and Approval to Place into Operation will be required. The ENGINEER has budgeted for one (1) permit package submittal. A permit fee is anticipated for submittal. The ENGINEER has budgeted up to $317.00 per permit submittal.

2.43 NCDEQ – Division of Energy, Mineral, and Land Resources, Erosion and Sediment Control – It is anticipated that an erosion control permit will be required for this Project. The ENGINEER assumes one submittal and one resubmittal. The ENGINEER will also attend one (1) in-person meeting at NCDEQ's Mooresville Office. The ENGINEER proposes utilizing NCDEQ's Permitting Plan Review process and has budgeted accordingly herein. Permitting fees are anticipated; the fee for Standard Permitting Review is a total of $119.00 per acre, assuming up to three acres of disturbed area, the ENGINEER has budgeted up to $357 in permit fees. The ENGINEER assumes no wetland impacts. If wetland impacts are determined to be necessary, the ENGINEER can provide additional permitting services as an additional service.

2.43.1 The ENGINEER will provide stream classification as necessary in support of NCDEQ Erosion and Sediment Control permitting process. The ENGINEER will fill out Notice of Intent for execution by OWNER. OWNER to pay Notice of Intent fee.

2.44 NCDOT Encroachment – The ENGINEER will prepare and submit an Encroachment Agreement Package (NCDOT Form 16.1) and supporting documentation for the new water main extension permit/bid packages. No permit fee is anticipated.

2.45 Town of Waxhaw Encroachment – A Town of Waxhaw encroachment permit may be required for this project. The ENGINEER will prepare and submit an encroachment permit application, if required. The need for such a permit will be confirmed following completion of the preliminary design phase. Any applicable permit or agency fees and costs shall be reimbursable.

2.46 Duke Energy Encroachment – A notification and written approval for encroaching across power transmission mains from Duke Energy is anticipated. No permit fee is anticipated.

Permitting fees and costs as reimbursable expenses shall be limited to the actual expenditures made by the ENGINEER during the performance of the work. Permit costs and fees paid for securing approvals of authorities having jurisdiction over the Project are considered reimbursable expenses and will be compensated at cost by the OWNER, subject to the not-to-exceed amount for Permitting set forth in Section 6.1.1.

Bidding – Upon receiving the required approvals from the regulatory agencies and the OWNER, the ENGINEER shall proceed with the Bidding portion of the project. Bidding will have no prequalification of bidders. The ENGINEER has budgeted for up to one (1) bid package/effort, being advertised and bid no more than one (1) time. Bidding will consist of the following tasks:

2.47 The ENGINEER shall provide to the OWNER one hard copy and one PDF (via e-mail) of final bidding documents, including drawing set and project manual, prior to issuance of public advertisement;

2.47 Issue a public advertisement for the project to the OWNER (advertising/listing in a newspaper and cost of advertising in a newspaper is the OWNER's responsibility) and advertise in the ENGINEER's digital plan room;

2.48 Coordinate plans and specifications distribution for bidding purposes through the ENGINEER's digital plan room;

2.49 Respond to Contractor questions concerning the plans and specifications;

2.50 Prepare up to two (2) addenda in response to any Contractor requests for clarification of the bid documents and coordinate with the OWNER in review, approval, and distribution of said addenda;

2.51 Conduct/assist the OWNER with the Bid Opening at the OWNER's offices;

2.52 Analyze the Bids and issue a recommendation of award to the OWNER;

2.53 Issue Notice of Award to successful Contractor;

2.54 Prepare contract documents for execution by the Contractor and the OWNER and distribute conforming copies of the construction contract documents to the OWNER and Contractor. These services will include furnishing the Contractor with unsigned construction contract documents, review of Contractor bonds and insurance certificates, and transmitting the construction contract documents to the OWNER for review and acceptance by the OWNER, signature and final distribution to the Contractor. The ENGINEER shall distribute conformed contract documents as follows:

2.54.1 The OWNER shall be provided with one complete half scale hard copy and one PDF (via e-mail) of the drawings, one PDF (via e-mail) of the project manual and five (5) hard copies of the project manual.

2.54.2 Contractor shall be provided with three hard copies and one PDF (via email) of conformed contract documents (drawings and project manual).

2.55 The ENGINEER's review of insurance certificates is only for the purpose of determining if the Contractor maintains the general types and amounts of insurance required by the contract documents and is not a legal review to determine if the Contractor's insurance complies with applicable requirements.

PART 3.0 ADDITIONAL SERVICES, NOT PART OF BASIC SERVICES:

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

PART 4.0 OWNER'S RESPONSIBILITIES:

The OWNER shall be required to provide the ENGINEER, or has already provided to the ENGINEER the following:

4.1 Access to the project site(s);
4.2 Available utility as-built, GIS, water model and CAD data for mapping purposes;
4.3 Assistance, as needed, with providing and/or confirming property records, and;
4.4 List of applicants and water utility customers based upon the OWNER's billing data.

PART 5.0 PERIODS OF SERVICE:

ENGINEER will endeavor to complete each phase of the Task Order, as specified below, within the time specified below upon written notification from by the OWNER:

5.1	Survey	Month 1 – 3
5.2	Preliminary Engineering	Month 1 – 3
5.3	Design	Month 3 – 7
5.4	Easement Mapping & Acquisition	Immediately upon completion of 90% documents, or sooner, as approved by OWNER.
5.5	Permitting[1]	Immediately upon Completion of 90% documents, as approved by OWNER.
5.6	Bidding[2]	Immediate Upon Completion of Permitting.

Notes:

1. The ENGINEER will submit all project elements for permitting as shown in the above referenced time frame. The ENGINEER does not guarantee that permits and/or encroachments shall be issued within said time frame.
2. Bidding services shall be provided to the OWNER by the ENGINEER in accordance with the schedule dictated by the OWNER.

PART 6.0 PAYMENTS TO ENGINEER:

6.1 Payment for Basic Services:

6.1.1 Basic Services. The OWNER shall pay the ENGINEER for services set forth in Part 2.0, Scope of Services, on an* hourly, not to exceed (NTE) basis, as set forth in Section 6.1 of the Agreement, not to exceed **$304,300.00** as outlined below:

*Per Diem,

Int _____

Project Management & Planning (HNTE)	$ 22,400.00
Preliminary Engineering (HNTE)	$ 11,400.00
Field Survey & Mapping (HNTE)	$ 81,000.00
Easement Exhibits, up to 25 (HNTE)	$ 33,400.00
Easement Staking, up to 3,000 LF (20 hours) (HNTE)	$ 4,200.00
Engineering Design (HNTE)	$ 100,000.00
Permitting (Reimbursable expenses and hourly fee with a total NTE)	$ 37,400.00
Bidding (HNTE)	$ 14,500.00
TOTAL	$ 304,300.00

6.1.2 For Hourly, Not to Exceed (HNTE) Fee work, the ENGINEER will bill the OWNER on the last day of each month for the labor and expenses incurred during that month. All hourly fee work will be charged based upon the labor category performing the work and corresponding hourly rate set forth in "Attachment A," which is incorporated herein by reference.

6.1.3 Additional Services. The OWNER shall pay the ENGINEER for additional services, which are not specifically called for in Part 2.0, Scope of Services, in accordance with the ENGINEER's standard rates. Additional Services will be paid only upon execution of an amendment to this Task Order or a new Task Order.

6.2 Payment for Additional Services:

Payment for Additional Services outside of the Basic Services Scope of Work as defined in Part 2 above, shall be based upon a mutually agreed upon fee using a firmly defined scope of services. No work outside of the Basic Services will be performed without a fully executed amendment to this Task Order.

This Task Order is executed this_____.

OWNER
UNION COUNTY,

NORTH CAROLINA

By:_____

Name: Brian W. Matthews

Title: County Manager

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

ENGINEER
W.K. DICKSON & CO., LLC. d/b/a Ardurra Group
North Carolina

By:_____

Name: Jeremy L. Brashears, PE

Title: Group Leader

Address: 1213 W. Morehead St., Ste. 300
Charlotte, NC 28208

Approved as to Legal Form: BTI

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

_____
Deputy Finance Officer

ATTACHMENT A
2026 RATE SCHEDULE

LABOR	**2026**
Principal	$304.00 /hr.
Practice Director	$304.00 /hr.
Senior Consultant	$273.00 /hr.
Group Leader	$278.00 /hr.
Senior Project Manager	$268.00 /hr.
Senior Electrical Engineer	$273.00 /hr.
Project Manager	$241.00 /hr.
Engineering Manager	$241.00 /hr.
Associate Project Manager	$226.00 /hr.
Senior Project Engineer	$241.00 /hr.
Project Engineer	$194.00 /hr.
Electrical Engineer	$210.00 /hr.
Engineering Associate II	$152.00 /hr.
Engineering Associate I	$136.00 /hr.
Senior Project Controller	$173.00 /hr.
Project Controller	$157.00 /hr.
Senior Scientist	$178.00 /hr.
Scientist	$157.00 /hr.
Senior Planner	$220.00 /hr.
Planner	$163.00 /hr.
Senior Engineering Designer	$173.00 /hr.
Engineering Designer 2	$157.00 /hr.
Engineering Designer 1	$126.00 /hr.
Senior GIS Analyst	$184.00 /hr.
GIS Analyst	$157.00 /hr.
GIS Technician	$136.00 /hr.
Senior Construction Observer	$163.00 /hr.
Construction Observer	$136.00 /hr.
Senior Funding Support Specialist	$152.00 /hr.
Funding Support Specialist	$142.00 /hr.
Senior Project Administrator	$136.00 /hr.
Project Administrator	$105.00 /hr.

EXPENSES	
Reproductions	Cost
Mileage	IRS Rate
Telephone, Postage	Cost
Travel (Meals/Lodging)	Cost
Subconsultants	Cost + 10%
Special Owner Requested Computer Software (1)	Cost + 10%

Note: The above rates are effective January 1, 2026. We ~~reserve the right to revise to reflect inflationary increases.~~

Int _____

Attachment ~~A~~ B Fee Estimate Int _____

Budget Table
Ardurra
16-in WM -Old Providence Rd

PLANtrax®

ALL	ALL	$ 304,243	$ 192,269	$ 111,974	944	$ 203.78	13	117	248	47	394	31	-	44	38	12
							Labor Category									
Phase and/or		Total Cost	Total Labor Cost	Total ODC	Total Hours	Labor Ave Hourly Rate	Principal	Sr.PM - JRB	SPE	PE	ED-2	Admin.	P.Cntrller	EM-1	SC - Varj.	Env. Sc
							$ 304.00	$ 268.00	$ 241.00	$ 194.00	$ 157.00	$ 105.00	$ 157.00	$ 241.00	$ 273.00	$ 178.00
Task Code	Task Description	$	$	$		$	Enter hours (not $) below									
	_Mgmnt. & Planning ($22,400)															
	Project Development, Mgmnt., research, etc.	6,832	6,802	30	28	242.93	2	16	4		6					
	Review of existing cond & project data provided by Owner	4,202	4,202		20	210.10		2	10		8					
	Kick-off meeting w/OWNER (In person at Owner's office)	3,352	3,292	60	16	205.75		4	4		8					
	Meeting Minutes and Initial Schedule Deliverable	1,933	1,933		10	193.30		1	3		6					
	Invoicing & Project Accounting & Schedule Updates (~9 mo	6,082	6,082		24	258.81	5	5	14							
	_Preliminary Engineering ($11,400)															
	Review NCDOT ROW Inquiry w/ Alignments	1,383	1,378	5	7	196.86		1	2		4					
	Review Hydrant FF data	2,637	2,637		12	219.75		1	5	6						
	Preliminary Wetland Determination	2,909	2,859	50	15	190.60			3							12
	Site Visits & Field Routing, Constructability Review	4,478	4,202	276	20	210.10		2	2		8			8		
	_Field Survey & Mapping ($120,800)															
	Survey subconsultant Coord. & Management	5,565	5,495	70	31	177.26		8			18	5				
	Level B SUE	20,444		20,444												
	Survey Route Confirmation (Post SUE B)	3,360	3,360		15	224.00		1	2	6				6		
	Survey	51,557		51,557												
	Easement Plats	33,413		33,413												
	Easement Staking (up to 20 hours @ $210 per hour)	4,200		4,200												
	_Design Services ($100,000)															
	General Drawing setup - Cover sheets, vics, etc.	10,870	10,870		56	194.11		4	4	10	30				8	
	Plan Sheets	27,633	27,588	45	146	188.96		6	20		100				20	
	Detail Sheets	7,134	7,134		40	178.35		2	2		32				4	
	Stakeholder Coord. (Duke, DOT, etc.)	6,332	6,332		28	226.14		2	12	10				4		
	Erosion Control Design and Details	10,564	10,564		59	179.05			6	9	40				4	
	Front End Contract Documents	4,112	4,112		20	205.60		4	10			6				
	Technical Specifications	5,848	5,848		28	208.86		4	12		12					
	Quantities/OPC	5,376	5,376		26	206.77		2	4		12			6	2	
	Owner submittal & Comments Review/implimentation	4,798	4,678	120	22	212.64		8	4		10					
	Ardurra QA/QC Review of each package	7,815	7,770	45	30	259.00	6	6	9					9		
	Implement Comments & Finalize Submittal	9,525	9,525		51	186.76		6	12		30	3				
	_Permitting ($37,400)															
	NCDEQ Public Water Supply - ATC	2,883	2,433	450	11	221.18		2	6			2		1		
	NCDEQ Erosion Control - Express Review (up to 3 ac.)	8,641	8,341	300	39	213.87		2	24		10	2		1		
	Meetings at Mooresville DEQ Office, up to 1	2,805	2,705	100	11	245.91		2	8					1		
	NCDOT Encroachment (Estimate 1 package)	3,817	3,817		22	173.50		1	2		18			1		
	Town of Waxhaw Encroachment	3,039	3,039		17	178.76		2	2		10	2		1		
	Duke Energey Trans Encroachment	4,256	4,256		20	212.80		4	8		8					
	Address Permitting Comments and update CDs	11,926	11,896	30	58	205.10		8	20	6	24					
	_Bidding ($14,500)															
	Draft Advertisement & List Plans	842	746	96	4	186.50		2				2				
	Contractor Inquiries	3,186	3,156	30	14	225.43		2	8			2		2		
	Prep & Issue Addenda (up to 2)	3,156	3,156		14	225.43		2	8			2		2		
	Bid Opening, Tabulation, & Letter of Rec. (2)	2,131	1,951	180	9	216.78		2	4			2		1		
	Review bid, quals, references, etc.	1,473	1,473		6	245.50		1	4					1		
	Coord. Contract Execution & Award	1,174	1,174		6	195.67			4			2				
	Prep & Provide RFC CDs	2,561	2,087	474	9	231.89		2	6			1				
	Total	$ 304,243	$ 192,269	$ 111,974	944	203.78	13	117	248	47	394	31	-	44	38	12

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

File #: 26-365 **Agenda Date:** 7/20/2026

TITLE:

Contract - Forest Park Gravity Sewer and Force Main Replacement Design

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to 1) negotiate and execute an agreement 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:

July 14, 2025, Regular Meeting, Agenda Item # 25-436 - Approved Contract - Forest Park Pump Station Expansion - Force Main and Pump Station Evaluation - Task Order 8686-05.

BACKGROUND:

The Union County Water Capital Improvement Program (CIP) includes an allocation for the design and construction of upgrades to the Forest Park Pump Station and Force Main as identified in the 2025 Master Plan. The previously approved evaluation confirmed sizing requirements for the pump station, force main, and gravity sewer to increase the system peak capacity to 2.4 million gallons per day as recommended in the 2025 Master Plan. This task order provides design, permitting, and bidding services for the project upgrades consisting of approximately 2,200 linear feet of 12-inch gravity sewer and 4,000 linear feet of 12-inch sewer force main.

CDM Smith has been selected to provide engineering services for Task Order 8686-08 Forest Park - Gravity Sewer and Force Main Replacement Design. CDM Smith was chosen from a list of vendors previously selected from RFQ 2024-021 - Engineering Services for Water and Wastewater System Improvements to provide these services for Union County Projects.

FINANCIAL IMPACT:

The total cost of the Task Order 8686-08 with CDM Smith is $644,640.00. Sufficient funds are available in Capital Account Program 60185082 - Forest Park Pump Station, Force Main & Interceptor Improvements.

APPENDIX

EXHIBIT A

This Task Order pertains to an Agreement by and between Union County (OWNER) and CDM Smith Inc. (ENGINEER), dated January 1, 2024 ("the Agreement"). ENGINEER shall perform services on the Project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order shall supplement the Agreement as it pertains to the Project described below.

TASK ORDER NUMBER: **8686-08**

RFQ NUMBER: **2024 -021**

PROJECT NAME: **Forest Park – Gravity Sewer and Force Main Replacement Design**

PART 1.0 PROJECT DESCRIPTION

The April 2025 Forest Park Pump Station Flow Modeling and Capacity Analysis Study (Study), prepared by ENGINEER, identified a projected 2040 capacity requirement of 2.4 million gallons per day (mgd) for the Forest Park Pump Station. This projected demand is consistent with OWNER's Wastewater Collection System Master Plan prepared by Brown and Caldwell.

The Study determined that a pump station and Force Main sizing alternatives analysis was necessary to confirm pump sizing, evaluate Force Main upsizing requirements, and assess associated ancillary upgrades, including variable frequency drives (VFDs), standby power generation, and incoming electrical service.

In addition, the Study identified the need to upsize approximately 2,069 linear feet of the existing 8-inch southern gravity sewer to a combination of 10-inch and 12-inch pipe between Manhole 561 and Manhole 4280. At OWNER's request, ENGINEER prepared a Pump Station and Force Main Alternatives Evaluation to address system needs and establish design criteria to advance the Project into preliminary and final design.

Based on Alternative 2 identified in the Pump Station and Force Main Alternatives Evaluation (previous phase, TO 8686-05), OWNER is requesting ENGINEER to prepare a Gravity Sewer and Force Main Replacement Design package. The design will include replacement of approximately 2,200 linear feet of existing 8-inch gravity sewer with 12-inch gravity sewer and approximately 4,000 linear feet of existing 8-inch Force Main with 12-inch Force Main, recognizing that both pipeline assets are located within the same 30-foot easement.

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

Basic Services to be provided by ENGINEER under this Agreement include the following:

- Task 100 – Project Management and Initiation
- Task 200 – Field Review
- Task 300 – Survey and Mapping

- Task 400 – Design
- Task 500 – Permitting
- Task 600 – Bidding and Award

The detailed scope of services for the basic services included under this Task Order (Tasks 100 through 600) follows.

TASK 100 PROJECT MANAGEMENT AND INITIATON

The Project Management task includes those activities involved with the detailed planning and subsequent monitoring and control of the Project. In addition to ENGINEER's normal in-house staff management and job tracking procedures, the following subtasks will be considered Project Management services:

101 Develop Detailed Project Schedule

ENGINEER will develop a schedule for engineering activities based on the tasks outlined in this Scope of Services. The schedule will be reviewed with OWNER and finalized, with copies sent to OWNER. The schedule will be developed using Microsoft Project software, which will also be used during the duration of the Project.

The schedule will incorporate interim deliverables and review periods for the following:

- 60-, 90-, and 100-percent design packages and review meetings
- Final bid ready documents
- 2 – Week Review Time for OWNER
- Construction cost estimates at 60-, 90- and 100-percent deliverables
- OWNER and permitting agency review periods

102 Project Initiation

A hybrid Project kickoff meeting will be held with OWNER to discuss Project schedule, administrative procedures, respective responsibilities, communications, OWNER contacts, OWNER expectations, progress reporting, data collection, and other Project matters as appropriate. Key stakeholders of OWNER and ENGINEER's team are expected to attend.

103 Project Meetings

ENGINEER has assumed the following meetings:

- Hybrid Kickoff Meeting.
- Hybrid Gravity Sewer and Force Main Replacement 60-Percent Review Meeting.
- Hybrid Gravity Sewer and Force Main Replacement 90-Percent Review Meeting.

- Hybrid Gravity Sewer and Force Main Replacement 100-Percent Design Review Meeting.

TASK 200 FIELD REVIEW

Related field review subtasks are described below.

201 Field Reconnaissance

Evaluate, through field investigation, the potential impacts of the proposed improvements and upsizing on OWNER's existing facilities, adjacent utilities, structures, traffic patterns, and public and private properties.

Perform field walkthroughs of the existing gravity sanitary sewer and force main to identify easement requirements necessary to accommodate the proposed upsizing and improvements. It is anticipated that the upsized gravity sewer and force main can generally be constructed within the existing 30-foot permanent easement by removing the existing gravity sewer and replacing it with the new 12-inch pipeline along the same alignment, with downstream piping activated progressively as construction advances. Evaluate whether replacement within the existing trench is the most appropriate approach or if a parallel alignment would be more effective in reducing bypass costs. Existing air valves will be assessed to identify any required repairs or replacements and to verify that valve sizing on the downstream force main is adequate for the anticipated increased flow conditions. The general alignment of the existing sewer and proposed upsizing is illustrated in Figure 1, which is attached and incorporated herein by reference.

202 Preliminary Design Technical and Constructability Reviews

ENGINEER shall facilitate a technical and constructability review workshop to confirm that the proposed design criteria are technically sound, constructible, and cost-effective. The workshop will be attended by the Technical Review Committee (TRC), consisting of senior engineering and construction professionals. OWNER may participate in the review session at their discretion. The review will also include evaluation of Specifications Divisions 00 and 01.

TASK 300 SURVEY & MAPPING

ENGINEER and its survey subconsultant shall perform surveying services to provide accurate information as to the horizontal and vertical locations of existing structures, land features, property identification, utilities, etc. within the fence line of the existing Forest Park pump station in order to allow the proper design of the improvements.

Surveying services will be conducted along the existing Forest Park Pump Station incoming gravity sewer and discharge force main. It is assumed that the surveying services will provide a planimetric and topographic survey for the Project corridor. The Project corridor is approximately 4,300 LF, 60-feet wide along the existing force main and gravity sewer alignment.

Surveying shall be in accordance with current North Carolina surveying standards and conducted using conventional, GPS, or other accepted methods. Local benchmark(s) as

established by the National Geodetic Survey shall be used to establish horizontal and vertical control within the Project limits.

Horizontal Datum shall be:	NC State Plane Coordinates NAD83
Vertical datum shall be:	NAVD 88

Related subtasks are described below:

301 Field Survey

ENGINEER shall perform field survey services to locate and document the horizontal and vertical positions (as applicable) of visible and exposed features within the Project limits. This includes paved surfaces (with pavement type identified); stormwater infrastructure such as culverts (including size, inverts, headwalls, inlet and junction boxes) and ditches (top and bottom of banks); utility appurtenances including power poles and guy wires, electric boxes, gas valves and meters, water valves and meters, fire hydrants, sewer cleanouts, exposed piping (with type, diameter, and material identified), cable boxes, and telephone pedestals; as well as fences, signage, mailboxes, tree and brush lines, and other miscellaneous aboveground improvements.

All trees measuring 18 inches in diameter or greater shall be field located, with size and species identified. Existing sanitary sewer manholes within the Project limits shall also be located and inventoried. Creek and stream features will be identified and mapped.

The survey subconsultant shall research and identify, where information is available, all applicable State, County, and City/Town rights-of-way, as well as obvious and apparent utility easements within the Project limits.

ENGINEER will coordinate with Sweetwater Utility Exploration (SUBCONTRACTOR) to locate and mark existing utilities at the pump station, and portions of the alignment near Highway 74 and the Monroe Expressway. SUBCONTRACTOR will perform approximately ten (10) soft digs (Level A) to verify subsurface utility locations. In addition to the soft digs, Level B SUE will be performed along the corridors, and coordination with NC811 will be included. All SUE markings, soft dig results, and field-delineated wetlands or streams within the corridor will be incorporated into the survey deliverables.

Easement staking services will be provided for up to twenty-three (23) parcels. Staking will include placement at easement angle points and termini, with intermediate stakes placed at typical intervals consistent with standard surveying practice. The budget assumes all 23 parcels are authorized for staking concurrently and completed under a single mobilization. Additional mobilizations may require a scope amendment.

OWNER will be responsible for notifying affected property owners of the proposed field work to be performed on their properties. Any additional services not specifically identified herein, including revisions resulting from changes in Project limits or regulatory requirements, may be provided under a separate authorization or contract amendment, if requested by OWNER.

302 Easement Mapping

Existing easements will be mapped, and easement exhibit plats will be prepared for an estimated twenty-three (23) parcels extending from the existing pump station site to Richard Baker Drive. Parcels not included in the survey effort will be represented using Union County GIS parcel data for adjacent parcels. ENGINEER will conduct partial boundary surveys for parcels requiring easements, with property lines adjacent to the easements surveyed in the field. Remaining portions of those parcels, as well as adjoining parcels, will be shown using Union County GIS data and depicted as dashed lines. Verification of compliance with NC Statutes will be performed.

Properties requiring easement shall have easement maps prepared at an appropriate scale for presentation on 8-1/2 x 12 sheets for acquisition in accordance with OWNER's standards and suitable for recording. Ties to property corners and details of the easement and temporary construction easements shall be shown. Maps shall be generated from the same file as the construction documents. Maps shall indicate area of permanent, temporary, and total easement and total area of property.

303 Geotechnical Investigations

Geotechnical services are included to enhance bid quality and reduce uncertainty. Although replacement of the FM and GS is generally anticipated to occur along the existing alignment, with downstream piping placed into service incrementally as construction progresses, the ENGINEER will evaluate whether installation within the existing trench is the most effective approach or if a parallel alignment would better minimize bypass requirements and associated costs.

The geotechnical investigation will include six (6) standard penetration test (SPT) borings and up to two (2) rock cores along the alignment. Laboratory testing will be performed to classify the soil and determine the best construction practices for the subsurface conditions. The findings of this evaluation will be documented in an interpretive geotechnical report, which will inform the recommended approach.

In addition to the geotechnical investigation and interpretive report, seven (7) technical specifications will be developed to support the construction recommendations: Soils and Aggregates for Earthwork, Geotextiles for Earthwork, Geotechnical Instrumentation and Monitoring, Rock Removal, Dewatering, Trenching and Backfilling, and Excavation Support.

TASK 400 DESIGN

ENGINEER shall develop 60, 90, and 100 percent design plans for a new 12-inch sanitary gravity sewer and 12-inch force main to replace the existing infrastructure. The design will generally maintain the existing pipeline alignment while addressing hydraulic capacity requirements, constructability considerations, and applicable regulatory and utility coordination needs.

401 Design Drawings and Specifications

ENGINEER shall prepare Contract Documents consisting of 60 percent, 90 percent, and final design (i.e., 100%) drawings and technical specifications that clearly define the scope,

extent, and nature of the work to be constructed and furnished by the Contractor. Specifications shall be developed, as appropriate, in general conformance with the 50-division format of the Construction Specifications Institute. One complete set of Contract Documents will be produced, incorporating all necessary drawings, specifications, and supporting materials required for bidding and construction. The Contract Documents shall include the following:

- Sediment and erosion control requirements.
- Relevant environmental features and special provisions related to construction.
- Details for pipe installation including modifications to existing joint restraint system as required for changes in operating conditions.
- Prepare combined plan and profile drawings at a scale of 1 inch equals 40 feet scale for the proposed 12-inch gravity sewer and 12-inch force main. The gravity sewer is anticipated to be approximately 2,200 linear feet and the force main approximately 4,000 linear feet. The anticipated deliverables include One (1) Cover sheet, two (2) General sheets, one (1) Site Plan sheet, eight (8) Plan and Profile sheets for gravity sewer and force main, and five (5) Detail sheets. .
- One Sheet to provide details on abandonment of approximately 1,250 LF of existing force main from the tee connection at the intersection of Independence Blvd. and Smith Farm Road down to approximately 13703 Independence Blvd. 8" plugs will be installed on both ends and the force main will be abandoned in-place.
- Surge analysis of the existing force main and associated air valve system under both near-term and future flow conditions. The analysis will be conducted to evaluate transient pressures, determine surge mitigation requirements, and confirm appropriate sizing and selection of air release and vacuum valves associated with the proposed pipe modifications. The surge analysis will also evaluate operational impacts resulting from increased pump flow rates.
- The pump station and piping will be part of the surge analysis of the force main. Although not anticipated, there could be potential changes to items such as existing air valves.
- Prepare construction bid documents to include general and special conditions, bid advertisement, measurement and payment description, special requirements for construction, and technical specifications. OWNER's standard front end and bidding documents will be utilized. ENGINEER will prepare the technical specifications.
- Design milestone submittals will be at 60%, 90%, 100%, and Bid Ready Documents.

The Proposed Drawing List follows:

1. Cover sheet
2. G-1 Index of Sheets, Symbols, Abbreviations, and General Notes
3. G-2 Gravity Sewer/Force Main Key Sheet
4. C-1 Pump Station Site Plan
5. C-2 Plan and Profile Sheet 1 Gravity Sewer & Force Main
6. C-3 Plan and Profile Sheet 2 Gravity Sewer & Force Main

7. C-4 Plan and Profile Sheet 3 Gravity Sewer & Force Main
8. C-5 Plan and Profile Sheet 4 Gravity Sewer & Force Main
9. C-6 Plan and Profile Sheet 5 Gravity Sewer & Force Main
10. C-7 Plan and Profile Sheet 3 Force main
11. C-8 Plan and Profile Sheet 4 Force main
12. C-9 Plan and Profile Sheet 5 Force main
13. CD-1 Misc. Civil Details I
14. CD-2 Misc. Civil Details 2
15. CD-3 Misc. Civil Details 3
16. CD-4 Misc. Civil Details 4
17. CD-5 Thrust Block Force Main Abandonment Details

402 Opinion of Probable Construction Cost (OPCC) Estimates

ENGINEER shall provide OPCC estimates at the 60-, 90- and 100-percent design stages of the Project.

403 Design Technical and Constructability Review

At approximately the 60-percent completion stage of the drawings and specifications, perform a Technical and Constructability Review. Conduct a workshop to discuss any adjustments to the design or Contract Documents. At 100-percent completion stage, the "front end" Contract Documents shall be complete for OWNER's review based on OWNER-provided front end and bidding documents, and a 2-week review shall be included in the Project schedule for the OWNER. Thereafter, ENGINEER shall bring the documents to completion.

TASK 500 PERMITTING

ENGINEER shall assist OWNER in securing permits associated with the Project including the following subtasks:

501 Regulatory Review

ENGINEER shall finalize the list of permits and approval requirements based on the information collected during the field review. Where necessary, ENGINEER shall discuss the proposed Project with the applicable regulatory agencies to fully define the permit requirements and identify major permitting issues that must be resolved. A permitting strategy shall be developed to address the major issues identified and facilitate the permit acquisition process.

502 Prepare and Submit Permit Applications

Applications for the required permits and approvals shall be prepared for submittals to the respective agencies. ENGINEER will prepare and submit the permitting packages on behalf of OWNER. This Scope of Work assumes the following:

- Preparation and coordination of the North Carolina Department of Environmental Quality (NCDEQ) Sediment and Erosion Control Permit and the National Pollutant Discharge Elimination System (NPDES) Stormwater General Construction Permit.

- Preparation and submittal of the NCDEQ Pump Station and Gravity Sewer Fast Track Sewer Extension Permit, as applicable to the proposed improvements.

- Coordination and preparation of permit applications for local jurisdictional approvals, including:

    - The ENGINEER will prepare permit applications for applicable construction and development activities. This includes zoning permits, which are required for all construction projects and are issued by the Planning Department for compliance with zoning regulations for new construction, renovations, and accessory structures. In addition, the ENGINEER will prepare environmental permit applications, as required, for activities such as construction or modifications to existing structures, in coordination with the Department of Environmental Quality (DEQ).

- North Carolina Department of Transportation (NCDOT) Encroachment Permit, where the Project impacts state-maintained roadways.

- Environmental permitting support for stream and wetland crossings, including:

    - ENGINEER will delineate jurisdictional streams and wetland boundaries in the Project corridors according to the 1987 US Army Corps of Engineers (USACE) Wetland Delineation Manual, significant nexus (Rapanos) forms, and Navigable Water Protection Rule of 2020 as needed. Jurisdictional areas will be flagged in the field for confirmation by USACE and/or the NC Division of Water Resources (DWR). Upon completion of the site visits, ENGINEER will prepare a Preliminary Jurisdictional Determination request and will contact a representative of USACE to schedule a site visit to approve the delineation for the construction package. This Task includes a one-day site visit for the construction package with the USACE (and DWR as applicable) representative to verify and approve ENGINEER's delineation. Upon confirmation by USACE, ENGINEER will engage a licensed surveyor to survey the delineation flagging and will incorporate this information in the overall Project survey.

    - Delineation support including GPS data collection, coordination with the surveyor to ensure features are accurately mapped, desktop review of threatened and endangered species and habitat, and

- A Floodplain Development Permit (FDP) from Union County and the Town of Stallings is anticipated based on the current understanding of the pump station location and the proposed gravity sewer and force main alignments. It is assumed that an FDP will be required and that no Letters of Map Revision (LOMR) or Conditional Letters of Map Revision (CLOMR) will be necessary

- An Environmental Assessment (EA) is assumed to not be required for the Project.

- Stream, creek, and wetland crossings associated with the gravity sewer are assumed to be constructed primarily using open-cut trenching methods, qualifying the crossings for

Nationwide Permits rather than Individual Permits, and mitigation fees and services are not included in this Scope of Work.

This Scope of Work assumes one (1) environmental field visit; additional field visits, expanded delineation efforts, or agency-requested revisions beyond the assumed permitting pathway are not included.

ENGINEER shall advance payment of all required permitting, review, and application fees associated with the Project and shall be reimbursed by the OWNER. The permit fee is estimated at $8,100 and is included in the total Project cost as an allowance.

503 Agency Meetings and Coordination

ENGINEER will coordinate with the regulatory agencies as necessary throughout the permit application and review process. This shall include up to two regulatory agency meetings. As part of this subtask, once the permit applications are submitted, ENGINEER shall maintain contact with the regulatory agencies to monitor and, where possible, facilitate the review process.

TASK 600 BIDDING AND AWARD

ENGINEER shall perform the following services related to Biding and Award. One bidding phase for a single construction contract is included. This Scope of Work assumes that a pre-qualification process for bidders and a re-bid will not be required.

601 Assist OWNER in advertising for construction and maintain a record of prospective bidders to whom Contract Documents have been issued, attend and conduct a pre-bid conference and receive and process deposits for Contract Documents.

602 Prepare addenda as appropriate to interpret, clarify, or further define the Contract Documents. Addenda may be issued by ENGINEER or OWNER. Provide one hard copy of the Contract Documents and an electronic copy in PDF format to the Owner.

603 Consult with and advise OWNER to determine the acceptability of substitute materials and equipment proposed by Contractor(s) when substitution prior to the contract award is allowed by the Contract Documents.

604 Attend and conduct the bid opening and prepare certified bid tabulation. Evaluate bids or proposals and assemble contracts for construction, materials, equipment, and services. Assist OWNER in contract award process.

PART 3.0 ADDITIONAL SERVICES (NOT BUDGETED):

ENGINEER agrees to perform out-of-scope services as requested by OWNER and as may be determined throughout the life of this Project. If the need for such services is identified, ENGINEER will prepare an amendment to this Task Order or a new Task Order that will include a scope, fee, and schedule and will submit to OWNER for approval. If approved, Additional Services will be performed upon execution of a Task Order Amendment or new Task Order.

PART 4.0 OWNER'S RESPONSIBILITIES:

The responsibilities of OWNER as described in this Task Order 8686-08 are as follows:

- Provide ENGINEER with reasonably available existing pump station operation data, records, record drawings, operations manuals, etc.
- Arrange for access to sites reasonably.
- OWNER shall provide a compiled set of review comments within two (2) weeks of receipt of deliverables.

PART 5.0 PERIOD OF SERVICE:

ENGINEER shall complete the services described herein with the following assumed schedule:

- Full Survey and SUE Completion: 3 months from NTP
- 60% Design Submittal: 2.5 months from Full Survey and SUE Completion
- 90% Design Submittal: 2.5 months from receipt of OWNER review comments on the 60% Design Submittal
- 100% (Final) Design Submittal: 2 months from receipt of OWNER review comments on the 90% Design Submittal
- Receive all Permit approvals: 4 months from 100% (Final) Design Submittal
- Receive all Easements: 12 months from 90% Design Submittal
- Bid-Ready Package: 2 months from permit and easement completion

The above schedule assumes that development of easement plats will occur after the 90% design submittal. ENGINEER assumes that none of the easements will require condemnation. ENGINEER is not responsible for any delays due to permit agency requirements or approvals, easement acquisition, or any other items that are outside of ENGINEER's control. If materially significant schedule delays occur, OWNER and Engineer will negotiate in good faith concerning a compensation adjustment for ENGINEER.

PART 6.0 PAYMENTS TO THE ENGINEER:

As complete compensation for the engineering services described in the Agreement and Task Order 8686-08, ENGINEER will be paid on a per diem (hourly not to exceed (HNTE)) basis for the services listed herein. The HNTE fee for this scope of services is $644,640 as complete compensation for the services described in Tasks 100 through 600.

All hourly work fee will be charged monthly based upon the personnel classifications performing the work and corresponding hourly rate set forth in the attached estimated hourly fee breakdown incorporated herein by reference as Attachment A. Labor and expenses for this task order will be invoiced according to Attachment C, which is attached and incorporated herein by reference. Subconsultant services will be invoiced as set forth in Attachment B, which is attached and incorporated herein by reference, and Section 6.1.5 of the Agreement.

ENGINEER shall not exceed the established Upper Limit of Compensation for the Project. However, the ENGINEER is not bound to individual task-level budget limits and may reallocate funds between tasks as necessary to effectively complete the scope of services, provided the overall Upper Limit is not exceeded.

UC Water		
Forest Park - Gravity Sewer and Force Main Replacement		
Task Number	**Task Name**	**Estimated Task Amount**
100	**Project Management and Initiation**	**$53,510**
200	**Field Review**	**$48,080**
300	**Survey & Mapping**	**$210,562**
400	**Design**	**$199,218**
500	**Permitting**	**$110,190**
600	**Bidding and Award**	**$23,080**
	Total	**$644,640**

PART 7.0 OTHER:

None

This Task Order is executed this _____.

UNION COUNTY,
NORTH CAROLINA

By: _____

Name: _____

Title: _____

Address: 500 N. Main Street

Monroe, NC 28112

By: _____

Name: Glendon J. Fetterolf, P.E.

Title: Associate

Address: 4600 Park Road, Ste. 240

Charlotte, NC 28209

Approved as to Legal Form: BTI

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

_____
Deputy Finance Officer





Figure 1: General Gravity Sewer and Force Main Alignment

Attachment A

Union County Water

Forest Park Gravity Sewer and Force Main Replacement Design

	Classification	Subject Matter Expert	Officer/Technical Specialist III	Principal/Associate /Technical Specialist II/Project Manager IV	Project Manager III/ Technical Specialist I	Professional III/Project Manager II	Professional II/Financial Accounting	Professional I	Designer Drafter	Senior Project Administration	Project Administration	Total Hours	Total Labor Dollars	Other Direct Costs/Expenses	Permitting Allowance	Subconsultant Services (with 10% Markup)	Total Cost
	2026 Billing Rates	$325	$310	$275	$240	$205	$165	$140	$130	$145	$115						
Task Number	**Task Name**																
Task 100	**Project Management and Initiation**	6	16	27	71	29	6	32	4		80	271	$52,510	$1,000			$53,510
Task 200	**Field Review**		24	44	24	36	72	18				218	$47,080	$1,000			$48,080
Task 300	**Survey and Mapping**			16	31	30		116	6		8	207	$34,810	$1,000		$174,752	$210,562
Task 400	**Design**		50	30	52	103	105	415	413	58	32	1258	$199,218	$500			$199,218
Task 500	**Permitting**		12	82	27	20	24	434		12		599	$110,190	$2,500	$8,100		$110,190
Task 600	**Bidding and Award**				14	24		48			28	126	$23,080	$1,000			$23,080
	Total Hours	**6.00**	**102.00**	**199.00**	**219.00**	**242.00**	**207.00**	**1063.00**	**423.00**	**70.00**	**148.00**						**2679.00**
	Total Project Cost																**$644,640**

Attachment B
Subconsultants Cost

	Qty	Unit Cost	Markup	Cost
Survey Services	1	$ 142,200.00	10%	$156,420.00
Geotechnical Drilling and Laboratory Testing Services	1	$16,665.00	10%	$18,332.00
Total Subconsultants Cost				**$174,752.00**

2026 HOURLY RATE & COMPENSATION SCHEDULE

Hourly Billing Rates

Classification:	2026 Billing Rates
Subject Matter Expert	$325
Officer/Technical Specialist III	$310
Principal/Associate/Technical Specialist II/Project Manager IV	$275
Project Manager III/ Technical Specialist I	$240
Professional III/Project Manager II	$205
Project Manager I	$185
Professional II/Financial Accounting	$165
Professional I	$140
Senior Designer	$155
Designer Drafter	$130
Senior Project Administration	$145
Project Administration	$115

1) The above rates include salary costs, overhead, and profit.

2) Hourly rates shall be reviewed in December of each year by ENGINEER, and adjusted, subject to OWNER's approval, to reflect the appropriate rates and charges for the next calendar year. In January of each year, ENGINEER will submit to OWNER for approval proposed hourly rates for the following year.

3) Reimbursable project expenses (such as printing, postage/shipping, etc.), incurred under Hourly or Per Diem will be billed to OWNER at cost. All vehicle mileage shall be billed at rates allowed by IRS.

4) Subconsultants employed by ENGINEER will be billed to the OWNER at cost plus 10% markup.

5) Approval of adjusted Hourly rates by OWNER does not affect cost ceilings for compensation under the Agreement for professional services, or currently open Task Orders/Purchase Orders.

6) Notwithstanding anything herein to the contrary, reimbursable project expenses, as referenced above, shall be limited to the Reimbursable Expenses set forth in Section 6.1.5 of the Agreement.

File #: 26-422 **Agenda Date:** 7/20/2026

TITLE:

City of Monroe Request to Provide Water and Sewer Service

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the request from the City of Monroe to provide water and sewer service to Parcels 09174012B and 09174006L (to be combined) located at 2830 Concord Hwy.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

City of Monroe recently received a request for outside city service located at 2830 Concord Hwy (see attached supporting documentation). Parcels 09147012B and 09174006L are to be combined and are requesting water and sewer to serve the proposed gas station on this property (2830 Concord Hwy currently has water service with the City of Monroe).

Union County does not have sanitary sewer in the area to serve the property.

The City of Monroe has indicated that they are prepared to serve the property with water and sewer, as outside City customers, if approval is granted from Union County. Our water and sewer service agreement with the City of Monroe prohibits the City from providing service outside the City limits without the expressed, written approval of the Board of County Commissioners.

Union County Water has no objection to the City providing water and sewer service to this property.

FINANCIAL IMPACT:

None.



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Get Adobe Reader Now!

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

File #: 26-424 **Agenda Date:** 7/20/2026

TITLE:

City of Monroe Request to Provide Water and Sewer Service

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the request from the City of Monroe to provide water and sewer service to Parcel 09102004 located along Village Lake Drive.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

City of Monroe recently received a request for outside city service located at Parcel 09102004 on Village Lake Drive (see attached supporting documentation).

The City of Monroe has indicated that they are prepared to serve the property with water and sewer, as outside City customers, if approval is granted from Union County. Our water and sewer service agreement with the City of Monroe prohibits the City from providing service outside the City limits without the expressed, written approval of the Board of County Commissioners.

Union County does not have infrastructure in the area to serve the property. Union County Water has no objection to the City providing water and sewer service to this property.

FINANCIAL IMPACT:

None.

Monroe

Out of City Limits
WATER AND/OR SEWER SERVICE REQUEST
Operations Center 704-282-4601

Applicant Name: Aaron & Jessica Taylor

Email address: AaronTaylor122187@gmail.com Phone number: 704-221-3925

Property Address: Village Lake Dr. Property Address Not yet Assigned

Tax Map Parcel Number 09 -102 -004 Parcel Size (Acres) 1 marked on Attached Map as Lot (1)

☑ **Water Service**

Request for Water Service is being submitted for the following reason(s).

☑ **New Construction**

☐ **Existing Well Failure.** Provide brief description: _____

☑ **Sewer Service**

Request for Sewer Service is being submitted for the following reason(s).

☑ **New Construction** ☐ **Existing Septic System Failure**

Out of City Limits - Water and Sewer Service Terms and Conditions

- All requests are subject to Union County Commission and City of Monroe Council approval.
- The Property Owner shall comply with the City of Monroe Water and/or Sewer Ordinances.
- An evaluation of voluntary annexation will be conducted.
- Property Owner shall pay the appropriate tap and capacity fees for outside City customers based on the prevailing fee schedule and will be required to set up an account with the City of Monroe Customer Service Department.
- Property Owner shall acquire all necessary offsite easements if required to connect to the City's water distribution and/or sewer collection system. A copy of the recorded private easement(s) shall be provided to the City of Monroe Water Resources Department.
- Upon payment of fees and completion of the water and/or sewer tap, billing shall begin immediately.
- Water services shall be per the City of Monroe Specifications and shall have remote radio read technology.
- Property Owner shall notify the City of Monroe prior to making the connection to the sewer tap to schedule an onsite inspection of the installation. Only one (1) property parcel shall be connected to the sewer tap.
- Property Owner agrees that the sewer tap shall be maintained by the City of Monroe at the Property Owner's expense.
- If a private grinder pump and sewer forcemain is required, the Property Owner shall install #12 gage coated plastic copper wire taped to the service lateral from the connection to the sewer tap to the house connection.
- Property Owner shall assume ownership and maintenance responsibility for the service forcemain and the sewer pump and all other plumbing past the sewer tap.
- Property Owner shall agree to pay a monthly flat rate sewer bill if water service is from a private well.
- Property Owner agrees that if the property is ever sold that he/she shall provide the new owner a copy of this Service Request/Terms and Conditions and shall fully explain the conditions, responsibilities and precise location of the private water service and/or sewer lateral or forcemain if a private pump is installed.
- Depending upon schedules for the Union County Commissioners meetings and Monroe City Council meetings, the total timeframe for service approval can take as long as 3-6 months.

I hereby certify that the information provided is, to the best of my knowledge, correct and complete. I understand that I must adhere to the City of Monroe's Out of City Limits – Water and Sewer Service Terms and Conditions as outlined above. I also understand that any approval may be revoked and penalties imposed under the City's ordinance if this certification is not complete and true or for failure to comply with the Terms and Conditions.

Aaron Taylor J M Taylor 6/30/26

Applicant's Signature *Date*

Monroe

Out of City Limits
WATER AND/OR SEWER SERVICE REQUEST
Operations Center 704-282-4601

Applicant Name: Dale & Kathy Manus

Email address: Idalemanus@gmail.com Phone number: 704-400-2624

Property Address: Village Lake Dr Property Address Not Yet Assigned

Tax Map Parcel Number 09 - 102 - 064 Parcel Size (Acres) 1 MARKED ON ATTACHED MAP AS (2)

☑ **Water Service**

Request for Water Service is being submitted for the following reason(s).

☑ **New Construction**

☐ **Existing Well Failure.** Provide brief description: _____

☑ **Sewer Service**

Request for Sewer Service is being submitted for the following reason(s).

☑ **New Construction** ☐ **Existing Septic System Failure**

Out of City Limits - Water and Sewer Service Terms and Conditions

- All requests are subject to Union County Commission and City of Monroe Council approval.
- The Property Owner shall comply with the City of Monroe Water and/or Sewer Ordinances.
- An evaluation of voluntary annexation will be conducted.
- Property Owner shall pay the appropriate tap and capacity fees for outside City customers based on the prevailing fee schedule and will be required to set up an account with the City of Monroe Customer Service Department.
- Property Owner shall acquire all necessary offsite easements if required to connect to the City's water distribution and/or sewer collection system. A copy of the recorded private easement(s) shall be provided to the City of Monroe Water Resources Department.
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- Water services shall be per the City of Monroe Specifications and shall have remote radio read technology.
- Property Owner shall notify the City of Monroe prior to making the connection to the sewer tap to schedule an onsite inspection of the installation. Only one (1) property parcel shall be connected to the sewer tap.
- Property Owner agrees that the sewer tap shall be maintained by the City of Monroe at the Property Owner's expense.
- If a private grinder pump and sewer forcemain is required, the Property Owner shall install #12 gage coated plastic copper wire taped to the service lateral from the connection to the sewer tap to the house connection.
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- Property Owner shall agree to pay a monthly flat rate sewer bill if water service is from a private well.
- Property Owner agrees that if the property is ever sold that he/she shall provide the new owner a copy of this Service Request/Terms and Conditions and shall fully explain the conditions, responsibilities and precise location of the private water service and/or sewer lateral or forcemain if a private pump is installed.
- Depending upon schedules for the Union County Commissioners meetings and Monroe City Council meetings, the total timeframe for service approval can take as long as 3-6 months.

I hereby certify that the information provided is, to the best of my knowledge, correct and complete. I understand that I must adhere to the City of Monroe's Out of City Limits – Water and Sewer Service Terms and Conditions as outlined above. I also understand that any approval may be revoked and penalties imposed under the City's ordinance if this certification is not complete and true or for failure to comply with the Terms and Conditions.

Kathy C. Manus 4/30/2026

Applicant's Signature *Date*

6/30/2026

To whom it may concern.
My name is Dale Manus. My wife and I, along with my daughter and her husband are proposing to purchase and build our personal homes on Village lake drive, Monroe, In which would be 1 acre lots each. The properties are adjacent to 925 Village lake drive (same side of street) which already has Monroe City water and sewer.
I am asking for your consideration for approval to connect to Monroe City water and sewer on our two proposed home sites.
The two acres (1 acre lot each) are side by side. I have attached a google map showing where existing water and sewer are already connected at 925 Village lake drive, as well as showing the two lots adjacent that we are proposing to build our homes on.
We very much appreciate your time and consideration to approve us for these services.

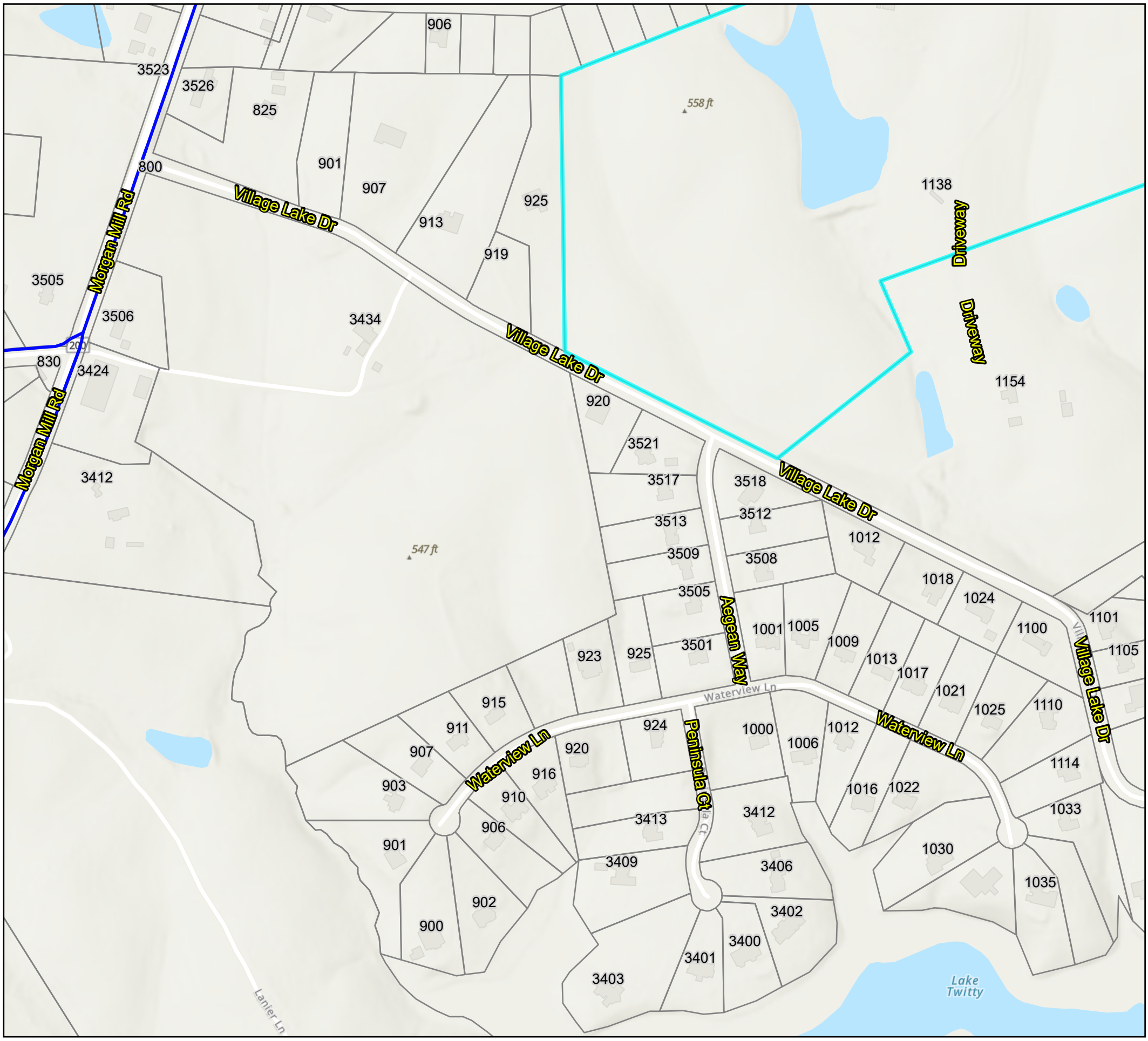
Note: The property has not yet been purchased as we would like to determine if these services will be available prior to purchase, so, we do not yet have a physical address or individual tax parcel number. I have listed the current tax parcel number of the property on our applications that these lots would be be divided from.
Please let me know if you have any question.

Thank you,
Dale & Kathy Manus.
(704) 400-2624

Aaron & Jessica Taylor
(704)221-3925

SV28467
SV28466
2" PVCC900
SV28459
V10113
H6025
SV20821
SV28464
SV28465
SV28463
SV28462
Proposed
Parcel 1
Proposed
Parcel 2
4" PVCC900
SV20811
CO303
V4816
V4815
SV20836
H2522
VILLAGE LAKE DR
6" PVC14
SV20824
2" PVCC900
3" PVCC900
6" PVC14
AEGEAN WAY
SV20842
LakePond
LakePond
LakePond

Water / Sewer Map



7/7/2026 3:00 PM

Scale: 1:4,890

0 0.04 0.08 0.16 mi

UCW

Water Tanks
Water Main
Sewer Cleanouts
Manhole
Sewer Pump Station
Water Reclamation Facility
Force Main
Gravity Main
Address Point
Road Labels
Parcels

Sources: Esri, Vantor, Airbus DS, USGS, NGA, NASA, CGIAR, N Robinson, NCEAS, NLS, OS, NMA, Geodatastyrelsen, Rijkswaterstaat,

This information is presented "as is" and without warranties. Union County does not assume any responsibilities for any decisions that may arise from the use of this data. The map will not be resold or otherwise used for trade or commercial purposes.

File #: 26-431 **Agenda Date:** 7/20/2026

TITLE:

Amendment 2 to Amendment 1 to Water and Wastewater Agreement with the City of Monroe

INFORMATION CONTACT:

Amy McCaskill, Union County Water - Utility Business Services, Director, 704-283-3508

ACTION REQUESTED:

Authorize the County Manager to negotiate and execute and agreement substantially consistent with this agenda item.

PRIOR BOARD ACTIONS:

1) June 17, 2019, Regular Meeting, Agenda Item # 30 - Approved Amendment #1 to the Interlocal Agreement.
2) September 2, 2025, Regular Meeting, Agenda Item # 25-540 - Approved Amendment to Amendment 1 to the Interlocal Agreement.

BACKGROUND:

Union County and the City of Monroe entered into an agreement in 2005 for the provision of water supply and wastewater treatment services between the parties. Per the agreement, each party is responsible for its proportional share of capital improvements at the respective facilities.

In 2019, the interlocal agreement was updated. The 2019 amendment updated Exhibits 3, 4 & 5 to reflect the City's anticipated improvements at its wastewater treatment plant (WWTP) facility with an estimated cost of $5,305,370 and the County's improvements at the Catawba River Water Treatment Plant (CRWTP) with an estimated cost of $68,541,270. The County's proportional share of Monroe's WWTP improvements is approximately $1,351,808, while the City's proportional share of the County's improvements at the CRWTP is approximately $3,790,332. Exhibit 6 was also updated to reflect a previous amount owed to the County by the City of Monroe for the relocation of a 42" water main along SC 5. The City had already paid their proportional share. This amendment also reflected changes in interconnects between the Monroe and Union County Water distribution systems.

The 2025 amendment (called Amendment to Amendment 1) updated Exhibit 3 to reflect the City's improvements at its WWTP facility with a cost of $6,257,518.65. The County's proportional share of Monroe's WWTP improvements is $1,594,465.81.
The current amendment (called Amendment 2 to Amendment 1) will update Exhibit 3 to reflect the City's improvements at its WWTP facility with a cost for 2026 projects of $2,192,000 and for 2027 projects of $9,390,000. The County's proportional share of these in improvements is $558,540 and $2,392,647, respectively. The City of Monroe’s Council approved this “Amendment 2 to Amendment 1 of the Water and Wastewater Agreement” at their June 9, 2026 meeting. The attached document has been executed by the City Manager.

FINANCIAL IMPACT:

The amount for the projects starting in 2026 has been budgeted for in the FY2027 budget. The amount for the projects starting in 2027 will be subject to budget appropriation in years FY28 through FY30.

STATE OF NORTH CAROLINA
COUNTY OF UNION

AMENDMENT 2 TO AMENDMENT 1 TO WATER AND WASTEWATER AGREEMENT

This Amendment, made and entered into as of the 9th day of June, 2026, by and between UNION COUNTY, a political subdivision of the State of North Carolina, hereinafter referred to as "Union," and the CITY OF MONROE, a municipal corporation of the State of North Carolina, hereinafter referred to as "Monroe," shall modify as indicated that Water and Wastewater Agreement between the parties dated December 5, 2005, as amended by Amendment 1 to Water and Wastewater Agreement on August 8, 2019, and Amendment to Amendment 1 to Water and Wastewater Agreement on August 12, 2025, hereinafter referred to as the "Agreement."

WITNESSETH:

WHEREAS, Union and Monroe made and entered into an agreement in 2005 for the provision of water supply and wastewater treatment services between the parties; and

WHEREAS; Section 3.8 of said Agreement recognizes that there may be future capital improvements to Monroe's WWTP, conveyance, and disposal facilities not related to increased allocated capacity, the cost for which Union would be responsible to the extent of its proportional share based upon its Allocated Capacity; and

WHEREAS, Section 3.6 of said Agreement provides that Union shall pay on a monthly basis for such improvements needed to maintain allocated capacities to Union (based on its proportional share), but that payments made lump sum by Union to Monroe and shown in Exhibit 3 shall not be included in the monthly fixed charges; and

WHEREAS, Monroe has made and financed such improvements; and

WHEREAS, Union and Monroe desire to update Exhibit 3 attached to the Agreement to reflect such additional improvements, including those improvements which Union will pay its share of such improvement costs through a single, lump sum payment.

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

1. Delete the Exhibit 3 attached to the Agreement, and replace it with the new Exhibit 3 attached hereto and incorporated herein by reference. Said new Exhibit 3 adds in the category of "Schedule of improvements for which single, lump sum payments are made" Project 5 and Project 6. Project 5 is described as WWTP Improvements, Chlorine Contact Chamber Coating, Clarifier 1 Rehabilitation and Clarifier 2 Rehabilitation which includes engineering services and construction costs. Project 6 is described as WWTP Improvements Clarifier 3 & 4 Rehabilitation, Lime Tank and

Pump Replacement, Digester #2 Rehabilitation, SO2 Building Crane/Trolley, and WWTP Solids Handling Facility which includes engineering services and construction costs. Additionally, Exhibit 3 reflects the cost allocation to Union for the lump sum payment by Union of Capital Costs Not Related to Increased Capacity.

IN WITNESS WHEREOF the parties hereto, acting under authority of their respective governing bodies, have caused this amendment to be duly executed in duplicate counterparts, each of which shall constitute an original, this the day and year first above written.

Attest:

Bridgette H. Robinson, City Clerk
(Seal)

CITY OF MONROE

By: William M. Watson
William M. Watson, City Manager

Date: 06-12-2026

Attest:

Clerk to the Board
(Seal)

UNION COUNTY

By: _____
County Manager

Date: _____

STATE OF NORTH CAROLINA
COUNTY OF UNION

AMENDMENT 2 TO AMENDMENT 1 TO WATER AND WASTEWATER AGREEMENT

This Amendment, made and entered into as of the _____day of _____, 2026, by and between UNION COUNTY, a political subdivision of the State of North Carolina, hereinafter referred to as "Union," and the CITY OF MONROE, a municipal corporation of the State of North Carolina, hereinafter referred to as "Monroe," shall modify as indicated that Water and Wastewater Agreement between the parties dated December 5, 2005, as amended by Amendment 1 to Water and Wastewater Agreement on August 8, 2019, and Amendment to Amendment 1 to Water and Wastewater Agreement on August 12, 2025, hereinafter referred to as the "Agreement."

WITNESSETH:

WHEREAS, Union and Monroe made and entered into an agreement in 2005 for the provision of water supply and wastewater treatment services between the parties; and

WHEREAS; Section 3.8 of said Agreement recognizes that there may be future capital improvements to Monroe's WWTP, conveyance, and disposal facilities not related to increased allocated capacity, the cost for which Union would be responsible to the extent of its proportional share based upon its Allocated Capacity; and

WHEREAS, Section 3.6 of said Agreement provides that Union shall pay on a monthly basis for such improvements needed to maintain allocated capacities to Union (based on its proportional share), but that payments made lump sum by Union to Monroe and shown in Exhibit 3 shall not be included in the monthly fixed charges; and

WHEREAS, Monroe has made and financed such improvements; and

WHEREAS, Union and Monroe desire to update Exhibit 3 attached to the Agreement to reflect such additional improvements, including those improvements which Union will pay its share of such improvement costs through a single, lump sum payment.

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

1. Delete the Exhibit 3 attached to the Agreement, and replace it with the new Exhibit 3 attached hereto and incorporated herein by reference. Said new Exhibit 3 adds in the category of "Schedule of improvements for which single, lump sum payments are made" Project 5 and Project 6. Project 5 is described as WWTP Improvements, Chlorine Contact Chamber Coating, Clarifier 1 Rehabilitation and Clarifier 2 Rehabilitation which includes engineering services and construction costs. Project 6 is described as WWTP Improvements Clarifier 3 & 4 Rehabilitation, Lime Tank and Pump Replacement, Digester #2 Rehabilitation, SO2 Building Crane/Trolley, and WWTP Solids Handling Facility which includes engineering services and construction costs. Additionally, Exhibit 3 reflects the cost allocation to Union for the lump sum payment by Union of Capital Costs Not Related to Increased Capacity.

IN WITNESS WHEREOF the parties hereto, acting under authority of their respective governing bodies, have caused this amendment to be duly executed in duplicate counterparts, each of which shall constitute an original, this the day and year first above written.

Attest:

_____
City Clerk
(Seal)

CITY OF MONROE

By: _____
City Manager

Date:_____

Attest:

_____
Clerk to the Board
(Seal)

UNION COUNTY

By: _____
County Manager

Date:_____

Exhibit 3. Monroe Allocated Wastewater Capacity to Union

Schedule of improvements for which monthly payments are made

						Payment Terms		
Project	Date	Item	Percent Allocated to Union	Total Cost	Total Annual Debt Service Cost	Monthly Fixed Charge	Begin Month	End Month
1	1995	SOC	21.67%	$0	$154,427	$2,789	5/1/1995	4/1/2015
2	1994	Biosolids Facility	21.67%	$0	$140,644	$2,540	3/1/1994	2/1/2019
3	1995	Expansion	30.00%	$0	$255,797	$6,395	5/1/1995	4/1/2015
4	2006	Interim Expansion to 10.4 MGD	50.00%	$0	$903,649	$37,652	7/1/2006	6/1/2007

Schedule of improvements for which single, lump sum payments are made

					Payment Terms		
Project	Date	Item	Percent Allocated to Union	Project Cost Estimate	Estimated Lump Sum Payment	Begin Month	End Month
1	2018	WWTP Improvements					
		Itemized Costs for Project 1					
		Blower Replacement/upgrade	25.48%	$600,000	$152,880		
		RAS pump replacements		$200,000	$50,960		
		Screen/Auger Conveyor Replacement		$572,000	$145,746		
		Screening Building Elec. Code Upgrade		$428,000	$109,054		
		Engineering		$90,370	$23,026		
		2000 kW Generator replacement		$1,025,000	$261,170		
		Chlorine Gas Scrubber		$1,200,000	$305,760		
		Influent pump 5&6 replacement		$425,000	$108,290		
				$4,540,370	**$1,156,886**		
2	2019	WWTP Improvements					
		Itemized Costs for Project 2					
		Replace filter effluent and drain valves	25.48%	$140,000	$35,672		
		Replace Filter Blowers (2)		$150,000	$38,220		
				$290,000	**$73,892**		
3	2020	WWTP Improvements					
		Itemized Costs for Project 3					
		Replace belt press	25.48%	$350,000	$89,180		
		Repair Influent Pumping Conduit w/ engineering		$125,000	$31,850		
				$475,000	**$121,030**		
4	2025	WWTP Improvements					
		EQ Basin Construction	25.48%	$5,399,543	$1,375,847		
		Engineering		$738,184	$188,095		
		Miscellaneous (DC Controls, Phillip Mungo, Endress & Hauser, Carolina CAT, NCDEQ)		$119,792	$30,524		
				$6,257,519	**$1,594,466**		
5	2026	WWTP Improvements					
		Chlorine Contact Chamber Coating	25.48%	$742,000	$189,068		
		Clarifier 1 Rehabilitation		$725,000	$184,736		
		Clarifier 2 Rehabilitation		$725,000	$184,736		
				$2,192,000	**$558,540**		
6	2027						
		Clarifier 3 & 4 Rehabilitation	25.48%	$1,450,000	$369,472		
		Lime Tank and Pump Replacement		$40,000	$10,192		
		Digester #2 Rehabilitation		$1,750,000	$445,914		
		SO2 Building Crane/Trolley		$150,000	$38,221		
		WWTP Solids Handling Facility		$6,000,000	$1,528,848		
				$9,390,000	**$2,392,647**		

Notes:

1, 2, 3 Projects 1, 2, & 3 represent Work-in-Progress; schedule to be adjusted based on final project costs reflected on Monroe's financial statements

4 Project 4 represents final cost of completed project.

5 Project 5 represents Work-in-Progress; schedule to be adjusted based on final project costs reflected on Monroe's financial statements

6 Project 6 represents work beginning in FY2027; schedule to be adjusted based on final project costs reflected on Monroe's financial statements

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

File #: 26-392 **Agenda Date:** 7/20/2026

TITLE:

Resolution - Conveyance of Surplus Vehicle

INFORMATION CONTACT:

Jon Williams, Emergency Services, Fire Marshal, 704-296-4296

ACTION REQUESTED:

Adopt Resolution Authorizing Conveyance of Certain Union County Surplus Property to New Salem Volunteer Fire Department.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

New Salem Volunteer Fire Department has requested vehicle 55-14, a 2014 Ford F-150 that was assigned to the Fire Marshal's Office. The Fire Marshal's Office has replaced the vehicle, and it is no longer in service. New Salem Volunteer Fire Department will use the vehicle to transport command staff for administrative tasks, training and emergency response. It would also be used to transport equipment to and from training and to tow their multiple response trailers.

In accordance with the notice requirements of N.C.G.S. 160A-280, public notice of this resolution was posted on July 9, 2026.

FINANCIAL IMPACT:

None.

RESOLUTION AUTHORIZING CONVEYANCE OF CERTAIN UNION COUNTY SURPLUS PROPERTY TO NEW SALEM VOLUNTEER FIRE DEPARTMENT, INC.

WHEREAS, Union County is the owner of a 2014 Ford F150 identified by Union County vehicle number 55-14 (the "Vehicle"); and

WHEREAS, Union County desires to declare surplus and donate the Vehicle to New Salem Volunteer Fire Department, Inc., a non-profit corporation organized under the laws of the State of North Carolina; and

WHEREAS, pursuant to North Carolina General Statutes § 160A-280, Union County is authorized to donate to a nonprofit organization incorporated by one of the United States any personal property, including supplies, materials, and equipment, that the governing board deems to be surplus, obsolete, or unused;

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

1. The Vehicle is hereby declared surplus.

2. The County Manager is authorized to convey the Vehicle to New Salem Volunteer Fire Department, Inc. in accordance with G.S. § 160A-280, and to execute such documents of conveyance as may be necessary to transfer ownership of the Vehicle.

Adopted this the ____ day of _____, 2026.

Attest:

Lynn G. West
Clerk to the Board

Brian Helms
Chair, Union County Board of Commissioners

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

File #: 26-394 **Agenda Date:** 7/20/2026

TITLE:

Grant Application - North Carolina 911 Board Grant

INFORMATION CONTACT:

Caleb Brackett, Emergency Communication, Director, 704-283-3790

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 Emergency Communications Center is the primary 9-1-1 Public Safety Answering Point (PSAP) for Union County. The 911 Center receives all requests for assistance in emergency and non-emergency situations and notifies or dispatches the proper agency/agencies.

The North Carolina 911 Board provides operating funds to all the PSAPs in the state. They have a grant cycle for PSAPs to request additional funding for projects that align with the board's funding priorities. One of the funding priorities for the FY2027 grant cycle is the replacement of end-of-life equipment required for operation of the PSAP.

Union County currently has critical infrastructure that has been deemed end-of-life by the manufacturer. The equipment replacement cost is partially covered by the 911 Board's annual funding distribution, and the grant request would cover the remaining cost.

FINANCIAL IMPACT:

The grant request is for approximately $812,000. There is no match required for this grant.

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

File #: 26-395 **Agenda Date:** 7/20/2026

TITLE:

Union County Transportation Procedures Manual

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt the Union County Transportation Procedures Manual as presented.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Transportation (UCT) must comply with multiple regulations to receive Federal and State funding. The North Carolina Department of Transportation and the Federal Transit Administration audit the Transportation Department, including reviewing the policies and procedures maintained.

Due to the business's ever-changing nature, the Department of Transportation must constantly tweak the UCT Procedures Manual to ensure that it remains compliant and relevant.

Updates have been to the following sections:

- Section 1, Subsection: Driver Advisory Board
- Section 4, Subsection: Essential Driver Behaviors
- Section 5, Subsection: Vehicle Fueling and Records Management
- Appendices:
  - A - UCT Rider's Guide
  - C - Cash Handling Procedures
  - D - UCT Comment form
  - W - Customer Survey

FINANCIAL IMPACT:

None. However, if the manual is not approved, the County's Transportation system may potentially be in noncompliance with the FTA, which could result in financial penalties in upcoming Federal and State grant funding.

Section 6: UC Board Approval

Approved by Union County Board of County Commissioners July 20, 2026.

Accountable Executive (Signature): _____

Date: _____

Governing Board Chairman (Signature): _____

Date : _____

LIST OF CHANGES SINCE LAST BOCC REVIEW

Revisions since the last BoCC review on May 5, 2025
5/14/25- Section 4: Driver and Passenger Guidelines pg 16 – minor grammar edits
6/1/26 – Section 1: General Information pg 9 - add Driver Advisory Board
6/1/26 – Appendix A: Rider's Guide updated to comply with accessibility requirements
6/5/26 – Appendix C: UCT Summary of Cash Handling Procedures updated with latest requirements
6/5/26-Section 5: Vehicle Guidelines-Records Management pg 32 and Appendix AA updated on hard drive storage
6/5/26 – Section 5: Vehicle Guidelines – Vehicle Fueling pg 28 updated to include propane fueling
6/5/26 – Appendix D: UCT Comment Form – updated to latest form.
6/5/26 – Appendix W: Customer Survey-updated to latest survey

Fare Increase

Public fare increases include only those where a portion of the fare is paid by the passenger. The following guidelines are used by UCT to guide activity and solicit comments from the public should a fare increase be necessary:

- Proposed changes would be presented to the Transportation Advisory Board (TAB) for approval.
- Depending upon the circumstances surrounding the change, a public hearing may be held, and changes may be presented to the BOCC for approval.
- A minimum of forty-five days' notice would be provided before implementation.
- A mass mailing would be conducted for all passengers.
- The information would be distributed on the vehicles to all passengers.
- Notices would be would posted in the local newspaper and/or on the County website and the local government channel.
- A file of all information and comments will be maintained for review.

Union County Transportation Advisory Board

The role of the Union County Transportation's Advisory Board (TAB) is to:

- Serve as the advisory body to UCT in the operation of the transportation system.
- Advise on all public transportation matters including proposed routes, service changes, ridership policies, fare structures, funding, and budgets.
- Recommend necessary changes to existing transportation rules and laws.
- Assists in supporting and promoting the use of public transportation.
- Monitors transportation services to the community to ensure an efficient operation.
- Make recommendations to the Union County Manager and Board of Commissioners on the transportation needs of the county's residents, particularly concerning a coordinated and cost-effective approach to the delivery of transportation services to area human services agencies and the general public.
- Perform other functions and responsibilities as may be requested by the County Manager or the Union County Board of Commissioners.

Driver's Advisory Board (DAB)

The role of the Driver's Advisory Board (DAB) is to:

- Serve as a communication link between drivers and management.
- Provide a forum for drivers to share concerns, suggestions, and recommendations regarding transit operations, safety, customer service, and workplace matters.
- Identify opportunities to improve operational efficiency and service delivery.
- Promote employee engagement and recognize employee achievements.

The DAB consists of four (4) driver representatives, the Safety Officer, a Dispatcher, and members of management. The DAB meets approximately every two (2) months, or as needed. Driver representatives are elected annually by their peers to serve one-year terms and may serve a maximum of two (2) consecutive terms.

UCT Compliment, Suggestion, or Complaint

UCT is dedicated to providing the highest quality service available to citizens of Union County.

not be eligible for transportation by Union County Transportation (UCT). To resume eligibility written (electronic or hardcopy) proof is provided to UCT of a bed bug inspection by a licensed pest control professional verifying that the passenger's living quarters do not have an infestation or source present.

Section 4: Driver and Passenger Guidelines

Drivers

The job as a driver is to transport passengers safely, courteously, and reliably. All drivers are expected to act responsibly and professionally at all times. The employee represents not only themselves but also UCT, the County, fellow employees, and the agencies paying for the service whenever you are on the job. Hopefully, the employee will find much satisfaction in helping many people each day who rely on our important community service.

Essential Driver Behaviors
The following essential behaviors are expected of all drivers:

- Drive safely and defensively – Always practice defensive driving skills; always obey traffic laws and signs; always stay focused on your driving duties. Drivers may not eat or drink while the vehicle is in motion. People's lives are in our hands. Responsible, smart, and safe driving practices are critical.
- Be Courteous – Make our passengers feel comfortable and safe. Treat all passengers with disabilities with sensitivity. Always be positive, helpful, and polite – even when the passengers make us angry. Let them know that we enjoy our job. Never give orders or be argumentative. Instead, use polite requests to get your point across. Vulgar language should never be used while on the vehicle. Remember, we are in the "people" business.
- Report All Accidents and Incidents - If involved in a vehicle accident of any kind, if a passenger who has an incident (e.g., a fall or trip, etc.) or gets ill on the bus or van, or if any security threat while on duty, then we must follow the procedures outlined on the Emergency Response Plan. All Accidents and Incidents should be reported immediately. (Refer to Appendix M and U)
- Keep Your Vehicle Clean – We are responsible for the care and cleanliness of each assigned vehicle. Treat vehicles as though they were personally owned. Remove litter promptly. Keep steps clean and the aisle clear of possible obstructions. Sweep steps and aisle free of sand, ice, mud, etc., periodically during inclement weather. If floors are slick, warn passengers to watch their step. Keep all seat belts, and restraints stowed neatly out of the way. A clean vehicle is a safe vehicle.
- Assist ALL PASSENGERS – Give appropriate assistance to all of our passengers. Ask every passenger who enters the vehicle how we could assist them. Make sure their seatbelts are properly fastened, and give them assistance on and off the vehicle if needed. Do not assume that ambulatory passengers can get in and out of the vehicle without assistance. Make sure they use handrails and are careful on the steps. Stand by (behind if necessary) and be prepared to catch them should they lose their balance and/or trip and fall.
- Use Good Safety and Security Awareness - Always be vigilant when coming to and from

- Radio volume is kept low so as to not interfere with listening to the two-way radio communication, passengers, or other vehicles.
- Stations/content that could potentially offend others should be avoided (e.g., music/talk show with vulgar language, political, or religious).
- Radio should be turned off while crossing railroad crossing and during the loading/unloading of passengers.

Vehicle Fueling

As a UCT driver, you are responsible for fueling the vehicle each day. UCT operates both gasoline and bi-fuel propane vehicles. The following safety regulations should be kept in mind:

- Vehicles should always be shut off
- Passengers should not be on board vehicles during fueling.
- The driver must ensure the correct grade of fuel is being used. Gasoline-powered vehicles require Regular Unleaded gasoline
- Bi-fuel vehicles require both Regular Unleaded gasoline and propane.
- Smoking, vaping, or the use of open flames is not allowed during fueling or around fueling facilities.
- Clean the windshield and recheck fluids if needed.

Wheelchair Boarding Methods

Our clients' safety will depend on more than just safely transporting them to their destination. Their safety will also depend on how well the drivers board and secure their wheelchairs. Several wheelchair boarding guidelines are indicated below:

- The driver must take all reasonable steps to deploy the lift onto a flat surface. The driver's deployment area should be one with enough space to allow the passenger to safely board. It is best for the driver to avoid curbs if it is reasonable to deploy the lift on a driveway.
- Roll the wheelchair onto the lift, making sure that the front wheels are inside the platform roll stop while the roll stop is in the upright position.
- Lock the brakes.
- If the passenger has the capability to do so, ask the passenger to hold on to the handrails provided on the lift. If the passenger does not have the capability to hold onto the handrails, ask the passenger to hold their hands in his/her lap.
- Before operating the lift for boarding, ask the passenger if they are ready. Keep one hand on the lift controls. Ask the passenger if it is okay for the other hand to rest lightly on the armrest of the wheelchair as the lift goes up while the driver stand on the ground; this will keep the driver alert to the stability of the chair while also providing the passenger with psychological comfort.
- Make sure that the lift is level with the floor before stopping. Be sure that there is a smooth surface created by the vehicle transition plate so that the wheelchair rolls smoothly over it and into the vehicle.

- Taking no action and not allowing others to take action that would interfere with the proper functioning of the System.
- Specifically noting the time and location of any incident, as if they do occur during the normal course of providing service, this will be part of the investigation.

Access to System Records

Restrictions: Under Union County Transportation policy, access to records created by the System is restricted by law. Access is limited to the following:

- Individuals responsible for the operation or administration of the System.
- Individuals who have a legitimate need to access the information for one (1) of the purposes listed in the "Use of Information Collected" section of this policy.
- If required by North Carolina or Federal law, a copy of the record may be provided. "Access" means that Union County Transportation staff may provide a summary of the information collected.

Chain of Custody: To the extent permitted by law, a chain of custody request form, which is attached here to as Appendix Z must be fully completed and signed by anyone requesting access to a System record.

Records will only be provided to parties who are granted access under applicable North Carolina and/or Federal Law.

Records Management

Recorded video/audio data is stored on the vehicle's DVR hard drive. Most vehicles are equipped with 1 TB hard drives; however, some vehicles have been upgraded to 2 TB hard drives. A 1 TB hard drive will record continuously for approximately 35 days or 283 total hours under normal operating conditions. Vehicles equipped with 2 TB hard drives provide approximately twice the storage capacity and corresponding retention period, depending on recording settings and operating hours. Retention periods may vary based on system configuration, resolution settings, number of cameras, and vehicle usage.

The total hours referenced above are based on the default setting as follows: D1 High Resolution, four (4) cameras, and an eight (8) hour operating day. When a hard drive reaches capacity, the system will automatically begin recording over the oldest recordings, thereby deleting those records.

The transit system will save relevant recordings to a computer or server with sufficient capacity to manage and retain the data as needed. (Refer to Appendix AA and BB.)



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UNION COUNTY TRANSPORTATION

Rider's Guide

Horizon

connecting you to the community you love

Sign Up
for
Union County's
Refreshed Newsletter!

ucgov.info/horizon



Appendix A



About

Union County Transportation (UCT) services are available to all Union County residents, ages 16 and over, through limited grant funded programs or through sponsorship of a local human service agency.

Some grant-funded trips require the passenger to pay a fare to share in the cost of the service. Cost depends on time of registration and type of trip scheduled.

Contact the Transportation Office

1407 Airport Road
Monroe, NC 28110
T 704-292-2511
T 800-735-2962 (TDD/TTY)
E transportation@unioncountync.gov

Transportation Appointment Line: 704-292-2511

- Option 1 – Español
- Option 2 – Appointments
- Option 3 – Registration
- Option 5 – Call to Return Home

Veterans Transportation Services: 704-283-3807

Limited English Proficiency
Translation service provided, free of charge, for customers who do not speak English.

Non-Discrimination Policy
We do not discriminate transportation services because of sex, race, color, national origin, age or handicap.

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Office Hours

Monday-Friday, 8 a.m. to 5 p.m.

Transportation services will not be provided on the following observed holidays:

- New Year's Day
- Martin Luther King Jr. Day
- Presidents Day
- Good Friday
- Memorial Day
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving and the day after
- Christmas, the day before and the day after



Who Can Ride?

Union County residents, ages 16 and older, as well as those aged 0-15 when accompanied by a parent or guardian

Funding is available for all residents to use UCT services, however some funding has special eligibility requirements for:

- Senior citizens, at least 60 years of age.
- Developmentally disabled adults.
- Physically disabled adults.
- Medicaid passengers (at any age).
- Veterans eligible for medical treatment at a VA Hospital or clinic.

Medicaid Transportation is available for eligible residents of any age. A parent or guardian must accompany children under the age of 16.

For riders under 18, a parent or guardian must sign an acknowledgment of receipt of the Rider Guide on their behalf.

ADA Reasonable Modification Policy

Union County Transportation (UCT) is committed to providing equal access and opportunity to qualified individuals with disabilities. Requests for modifications of UCT policies, practices or procedures to accommodate an individual with a disability should be made in advance of a trip.

How to make an ADA modification request:

- Visiting unioncountync.gov/transportation and filling out the online request form.
- Mailing a written modification request to 1407 Airport Road, Monroe, NC 28110

Compliments, Suggestions and Concerns

Communication with customers is essential in our ability to provide safe, reliable and responsive transportation to residents. Please provide your feedback by filling out the comment form found on **unioncountync.gov/transportation**, in person at the UCT office, or over the phone.

Every effort will be made to address complaints in an expeditious and thorough manner.

Appendix A

Passenger Requirements and Expectations

The requirements, rules, expectations and guidelines in this Rider's Guide apply to all registered customers/passengers. They apply to all interactions and communications with UCT staff and other customers while in person loading/unloading, on board a vehicle or in a County facility, as well as on the phone and in writing via email or text, etc.

By completing a registration, either directly or through a submitter on your behalf, you become a registered passenger and agree that you have received, reviewed and understand all UCT policies and guidelines, and agree to comply with all information/expectations included herein.

Failure to adhere to any components will result in suspension or termination of service.

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How to Make a Reservation

- Call 704-292-2511, select option 2.
- Trip reservations must be made 48 business hours in advance.
- Trips may be scheduled up to a year in advance of your appointment date.

Provide the following information:

- Passenger name, address and phone number.
- Appointment date and time.
- Destination address, phone number, clinic or physician name.
- Mobility needs/personal care attendant information.

Transportation will call to confirm the reservation.

Passengers should not give the driver appointment requests, as they will not be processed.

Each passenger is responsible for calling the office and scheduling transportation for themselves.

Enjoy a safe trip by following these rules and tips:

- Wear a seat belt
- No tobacco products
- No open containers of food/drinks
- No profanity
- No standing/moving
- No weapons
- Plan ahead for carry on items
- Be ready to board when the vehicle arrives
- Provide accurate pick-up and drop-off addresses when making your reservation

Appendix A

Appointment Types

Medical Appointments

- **Transportation within Union County**
  Monday-Friday, 8 a.m. to 4 p.m., as schedule allows.

- **Transportation to Matthews**
  Monday-Friday, 9 a.m. to 1 p.m.
  Appointments should be complete by 2 p.m.

- **Transportation to Salisbury**
  Select prescheduled days, no earlier than 9:30 a.m.
  Appointments should be complete by 1:30 p.m.

- **Transportation to Charlotte**
  Select prescheduled days, 8 a.m. to noon.
  Appointments should be complete by 1 p.m.

Visit **unioncountync.gov/transportation** for available dates to travel to Charlotte before making an appointment.

We provide transport to Charlotte for medical, Social Security or Disability determination appointments only.

All passengers remain in Charlotte until everyone's appointment is completed. The length of time you will be in Charlotte will vary depending on how many people are riding and the type of appointments they have scheduled. Please plan appropriately by bringing something to read or listen to using headphones.

Trips to Charlotte may involve a relay in which we partner with Anson County to transport you on days we do not go. UCT will pick you up and transport you to a designated area to meet the relay van which will transport you to your Charlotte appointment. Once everyone is finished, the relay driver will bring you back to the relay area, and UCT will pick you up and take you home.

Drivers have planned their schedules in advance to ensure that everyone reaches their appointment on time.
When one person is late or requests to change their destination, it can create late arrival times for everyone, therefore same day modifications may not be approved. For more details, see page 10.



Need a ride to run a few errands, or enjoy some leisure activities?

Non-Medical Appointments

Tuesdays, Thursdays & Fridays, 11:30 a.m. drop-off and 1:30 p.m. pick up.

Trips are limited to two hours and start from the time you are scheduled to be dropped off. If you are not ready within the two-hour window, UCT will not be responsible for your return home.

All reservations must be made at least two business days in advance of your appointment.
We recognize that occasional emergencies may arise and will do our best to accommodate same day appointments when possible.



How to Ride

The Day Before Your Trip

Passengers will receive an automated reminder for scheduled trips. You may cancel your trip during this call if needed.

Pick-Up Procedures

- Be ready one hour before your scheduled appointment if the appointment is located in Union County, unless otherwise notified by your driver.
- Trips out of Union County may require a pick-up of more than two hours in advance of your scheduled appointment.
- Board promptly when the vehicle arrives. Drivers may only wait three minutes for ambulatory riders or five minutes for wheelchair or limited mobility passengers.
- Passengers who use wheelchairs/scooters must have a ramp if steps are present. Drivers will not "bump" passengers up/down stairs or in/out of houses.
- If you are approved for door-to-door service, drivers may not cross over the threshold of a dwelling to bring passengers to the van.

Return Trip Procedures
Contact 704-292-2511, option 5

- You will be picked up at the same place you were dropped off. Do not leave the destination, drivers will not pick you up from a different location.
- Drivers will not enter a facility to look for passengers, unless a passenger has a preapproved modification for assistance. Drivers will only wait three minutes for ambulatory riders or five minutes for wheelchair or limited mobility passengers.
- If you are unable to enter your home, Union County Transportation will attempt to call your emergency contact. If 15 minutes have passed, you will be offered to be dropped off at your previous destination, or, as a last resort, to the local police station. If you accept this offer, Transportation will not be responsible for taking you back home.
- If you reject the offer, the driver will notify dispatch that the passenger was dropped off but had no access to enter the home.

Curb-to-Curb Service

Union County Transportation is a curb-to-curb transportation system. Special exceptions may be made to allow for door-to-door assistance.

Door-to-Door Service

First floor, door-to-door assistance may be provided if requested at the time of registration and deemed necessary. Passengers approved for door-to-door service should ensure their property is cleared of any hazards (e.g. loose aggressive dogs, unsafe stairways, etc.) and has appropriate access for their mobility needs (e.g. no stairs, or a ramp for those using a wheelchair). If UCT identifies a safety concern, the issue must be corrected or the passenger will be denied door-to-door service.

For passengers approved for door-to-door service, drivers may not cross over the threshold of a dwelling to bring passengers out to the van.

Appendix A

Fares & Fees

Passengers may pay $2 for a one-way trip within Union County. Costs may vary depending on grant funding allocated for various types.

Destinations outside Union County could incur additional costs.

Passengers will be charged a $2 fee for each late cancellation. A cancellation must occur before noon the business day before the scheduled trip.

Passengers required to pay fares or who have late cancellation fees, must pay prior to their next scheduled trip, either at the UCT office or when they board the vehicle.

Passengers who pay when boarding must have the correct change to pay the driver.

Payment for fares and late cancellation fees must be received in advance of scheduled trips. Passengers who do not meet this requirement will not be transported and will be charged as a No Show.

Passengers who fall behind more than $10 in payment of fares and late cancels will not be allowed to schedule appointments until the balance is paid.

Continued failure to follow the policy for paying fares and fees will result in suspension or possible termination of service.

Cancellation

Cancellation must occur before noon on the business day preceding the scheduled trip by calling the Transportation office or responding to the automated trip reminder call indicating a cancellation. Cancellations can be made by leaving a voicemail 24 hours a day at 704-292-2511, option 2.

Cancellations after the deadline will be considered a "late cancellation" and the passenger will be charged a $2 fee. A notice will be mailed to the address on file. Failure to pay the late cancellation fee prior to or on the day of the next scheduled appointment could result in suspension or termination of service if fees reach $10.

No Show

If UCT arrives and the client does not ride it will be considered a No Show. Drivers will wait three (3) minutes for ambulatory passengers and five (5) minutes for wheelchair passengers.

After the alloted time, the passenger will be considered a "no show" and will be charged a $10 fee.

A no show warning notice will be mailed to the address on file. Failure to pay the no show fee prior to or on the day of the next scheduled appointment could result in suspension or termination of service if fees reach $20.

If the No Show occurs on the first leg of a trip, the return/home trip will be canceled.

The following No Show policy applies to all passengers regardless of funding source:

- Three No Shows in any 90-day period (first offense) results in a 30-day suspension.
- Three additional No Shows in any 90-day period (second offense) results in a 60-day suspension.
- Three additional No Shows in any 90-day period (third offense) results in a 90-day suspension.
- Three additional No Shows in any 90-day period (fourth offense) results in a permanent suspension.

Termination of Service

Termination of service for passengers who fail to comply with passenger guidelines and expectations, no show policy, and fare policy as outlined in this Rider's Guide or other applicable Passenger Policy documents will be made by the Transportation Director. Passengers have the right to appeal in writing within 10 days to the Transportation office. The appeal will be reviewed by three UCT Advisory Committee representatives and the passenger will be notified of the decision

Termination of service will result for reasons deemed appropriate, including but not limited to the passenger:

- Failure to comply with the rules and expectations as set forth in this "Union County Rider's Guide."
- Having three No Shows three times after their third temporary suspension.
- Requesting to be removed from the program or moving out of the service area.
- Failure to pay for services.

Appendix A

Accompanying Riders

Personal Care Attendants

Personal Care Attendants (PCA) may ride with individuals requiring personal or medical assistance. A PCA will be established and noted in our system upon scheduling your appointment.

The PCA must ride with the client at all times and may not have a different pickup point or destination than the client. A PCA will not be allowed on the vehicle until UCT has established the validity of the PCA.

Children

A parent or guardian must accompany children under the age of 16.

The age and weight must be given when an appointment is made for a child. This will determine if a child restraint seat is required.

UCT requires that parents/guardians of the child needing transportation provide the necessary child restraint system.

- UCT will not transport any child weighing less than 80 pounds or younger than 8 years old unless they are properly secured in a weight appropriate child passenger restraint system by a parent or guardian.
- If no seating position equipped with a lap and shoulder belt to properly secure the weight-appropriate child passenger restraint system is available, a child less than eight years of age and between 40 and 80 pounds must be restrained by a properly fitted lap belt only.
- Vehicle and child restraint system manufacturer instructions must be followed with regards to seating position and child restraint system installation.

At the end of the trip, it's the parent/guardian's responsibility to remove the child and child restraint system from the vehicle.

Service Animals

All service animals individually trained to provide assistance to an individual with a disability may accompany a passenger with a disability (or the trainer) in facilities, or on vehicles operated by Union County Transportation at no charge.

According to USDOT ADA regulations, a service animal is "any guide dog, signal dog, or other animal individually trained to work or perform task for an individual with a disability."

When riding on UCT vehicles with service animals, riders will follow any pertinent UCT policies or directives herein.

Animals that are pets are not allowed on UCT vehicles.

Owner/Rider Responsibility

UCT must be notified at the time a reservation is made, that there will be a service animal riding with the client. Animals must be restrained by a harness, leash or some form of lead, unless the owner/rider is in full control of the animal at all times.

Animals must travel on the floor or in the owner's lap. Animals may not travel in vehicle seats or block aisle.

Owner is responsible for the cost to repair any damage to property caused by the animal [Ref: NC G.S. 1684.4]. UCT reserves the right to deny transportation of passengers with service animals if the animal poses a direct threat to the health or safety of others until the problem is rectified.



Wheelchairs and Other Mobility Devices

For the safety of all passengers, wheelchairs and other mobility devices must be secured in the vehicle securement stations.

UCT drivers shall utilize manufacturer's suggested procedures for proper securement of wheelchairs whenever possible. UCT drivers will make the best use of securement technology based upon the nature of the wheelchair to ensure the safety of seated passengers.

If a driver cannot secure a wheelchair, the passenger will be denied service. It is the policy of UCT that wheelchair securement is required and thereby creates a safer transport for all riders including those using wheelchairs. Anyone who refuses to have their wheelchair secured will be denied transportation on UCT vehicles.

The Americans with Disabilities Act (ADA) defines a wheelchair as "a manually operated or power- driven device designed primarily for use by an individual with a mobility disability for the main purpose of indoor, or of both indoor and outdoor, locomotion. Individuals with mobility disabilities must be permitted to use wheelchairs and manually powered mobility aids, i.e., walkers, crutches, canes, braces, or other similar devices designed for use by individuals with mobility disabilities, in any areas open to pedestrian traffic." (Ref.: APPENDIX 3, Americans with Disabilities Act – 49 CFR Parts 27, 37 & 38).

In accordance with ADA, UCT is required to accommodate all "wheelchairs" unless lift or vehicle cannot accommodate or there are legitimate safety issues. For example, if the lift has a maximum weight limit of 1000 lbs. set by the manufacturer, the passenger and his/her device must not exceed 1000 lbs. Due to the equipment that UCT uses, passengers that have devices that are longer than 48 inches or wider than 30 inches may not be accommodated; the same is true if the total weight of the passenger and his/her device exceeds 1000 lbs.

If the passenger's home is not equipped with a ramp and the home has stairs, the driver will meet the passenger at the bottom of the stairs. The same is true in homes equipped with a door frame threshold with a ledge, drivers may not "bump" a passenger up or down to get over the ledge or move up or down stairs.

If a driver is assisting a passenger who uses a wheelchair, all wheels should be on the ground at all times. If a passenger needs assistance to get over a threshold ledge or stairs, the passenger is to request assistance from an attendant, caregiver or family member. For safety and liability reasons, UCT drivers may not provide this type of assistance. Drivers are not permitted to assume the controls of power wheelchairs to assist riders with boarding.



While on Board

Seat Belt Policy

Seat belts must be worn while the vehicle is in motion to ensure the safety of all passengers and compliance with state laws.

Passengers should not remove their seat belt until they have reached their destination. Transportation services may be immediately terminated if a passenger refuses to be properly secured.

A waiver will only be granted if a letter is on file at the Transportation office from the passenger's physician stating that the passenger is unable to use a seat belt for medical reasons. It is the responsibility of the passenger to provide this documentation.

Passengers in wheelchairs are required to use the vehicle seat belt system and also be secured on a wheelchair securement station.

Seating

No passenger is allowed to sit in the front seat of any UCT vehicle.

Carry-on Items, Food & Weapons

For safety and liability reasons, passengers are limited to three packages of shopping bags or carry-on items.

Carry-on items must fit under the seat or in the lap of the passenger, and may not take up any additional seating in the vehicle.

Passengers are responsible for loading and unloading any carry-on item and shall always be in control of items while on board.

Passengers should not expect the driver to help carry their bags on or off the vehicle. Some consideration will be given to passengers who are elderly or disabled.

Passengers needing the use of oxygen tanks must notify UCT at the time transportation is scheduled. UCT recommends passengers take the smallest tank possible for the expected time away from home. Oxygen supplies must not obstruct the aisle (49 CFR 37.167(h)).

No weapons of any kind, concealed or otherwise are allowed on UCT vehicles unless the person carrying the weapon is a law enforcement official.

Open containers of food and/or drinks are prohibited on UCT vehicles. Only passengers with a documented medical need are allowed to eat and drink while on board.

Appendix A

Safety Instructions - In Case of an Emergency

Drivers must respond in the event of an emergency or risk to their passengers or vehicle.

The driver may ask for your physical assistance in response to an emergency or to help reduce or eliminate the potential for injury or harm. Anyone incapable of performing the requested task due to a disability must notify the driver immediately.

Conduct Expectations

UCT passengers are expected to conduct themselves with good citizenship, decorum, and respect for others.

The following are **strictly prohibited while onboard any UCT vehicle, on UCT property, or interacting with UCT staff in any manner**. These behaviors **will not be tolerated** and may result in suspension or termination of transportation services:

- Unruly or disruptive behavior.
- Profanity or vulgarity.
- Behaving in a threatening manner or threatening other passengers or UCT staff verbally or in writing.
- Assaulting or attempting to assault another person, including physical or non-physical acts such as spitting or throwing objects.
- Inappropriate display of affection or sexual activity towards the driver or other passengers.
- Release of human waste. This includes spitting. Any passenger who has problems with incontinence must be properly clothed before boarding the vehicle.
- Use of lighters or any sort of open flame.
- Use of tobacco products of any kind (e.g. smoking, vaping, chewing tobacco).
- Use of illegal drugs and/or alcohol. UCT reserves the right to deny service to anyone who appears to be under the influence of illegal drugs and/or alcohol.

Passengers who cause any form of damage to UCT vehicles or other property will be held responsible for the cost of the repairs and be subject to other consequences such as suspension or termination of transportation services.

Passengers who do not follow these rules or any other rules in this Rider's Guide will be reported to dispatch with the possibility of being asked to deboard the vehicle.

Bedbugs

Passengers who have been identified as having bedbugs, based on either physical observation of a bedbug on their person or clothing, or notification from a service provider to whom the passenger is being transported, will not be eligible for transportation by UCT until written (electronic or hardcopy) proof is provided to UCT of a bedbug inspection by a licensed pest control professional verifying that the passenger's living quarters do not have an infestation or source present.

Body Odor/Personal Hygiene

A passenger may not be allowed on a vehicle if his or her body odor or personal hygiene will disturb the reasonable comfort of other passengers or UCT Staff. Odors may include but are not limited to scents related to unlaundered clothing, lack of bathing, animal related odors, and excessive perfumes.

A passenger will be given notice and an opportunity to correct the odor or hygiene problem prior to temporary suspension of riding privileges, unless in the judgment of UCT staff, that person places existing passengers in extreme discomfort or is considered a health risk to others.

If the body odor or personal hygiene issue is a result of an underlying medical condition, the passenger could present UCT a doctor's note acknowledging that there is a condition, without disclosing the condition.

Passengers with mobility devices must maintain such devices in a state of cleanliness.

Inclement Weather

In the event extreme weather conditions exist which makes travel unsafe, UCT reserves the right to discontinue service until conditions are favorable.

If service is temporarily discontinued, all rides, regardless of trip purpose, will be canceled.

Camera System

All UCT vehicles are equipped with camera systems that are recording at all times while the vehicles are in operation.



Same Day Modification Requests

Same day modifications to change and/or add to your schedule are not typically permitted.

Requests for modifications of UCT policies, practices, or procedures to accommodate an individual with a disability should be made in advance of a trip when possible.

In an emergency situation, when a request for a service modification cannot practically be made in advance, the passenger may make a request on the same day or during service.

- The passenger should make the request to the UCT driver and must describe in detail what is required and why it is necessary in order to use the service.
- Drivers may grant a request for an additional passenger stop not shown on the driver manifest if such request is reasonable, and meets UCT's policy requirements and is approved by dispatch in consultation with UCT management.

Requests may be denied if granting the request:

- Fundamentally alters the nature of UCT's service, programs or activities;
- Creates a direct threat to the health or safety of the requester or others;
- Creates an undue financial or administrative burden for UCT; or
- Without such modification, an individual with a disability would still otherwise be able to fully use UCT's services, programs or activities for their intended purpose

For modification requests that require extended consideration and are not able to be granted immediately, the passenger is encouraged to submit a written request for further consideration for future trips.

UCT's ability to grant requested modifications may vary by day of travel, time of day, or other circumstances. For example, while a request may be able to be granted in one instance, that same request may be denied in a different instance if it would fundamentally alter the nature of the service, create a safety threat, or if the request is not a functional necessity.

In the case of a denial of a modification request, UCT will take, to the maximum extent possible and in compliance with its policies, any other appropriate actions to ensure you receive service.

Appendix A

Title VI of the Civil Rights Act

U.S. Department of Justice regulations, 28 code of the Federal Regulations, Section 42.405, Public Dissemination of Title VI Information, requires recipients of Federal financial assistance to publish or broadcast program information in the news media. Advertisements must state that the program is an equal opportunity program and/or indicate that Federal law prohibits discrimination. Additionally, reasonable steps shall be taken to publish information in languages understood by the population eligible to be served or likely to be directly affected by transportation projects.

UCT hereby gives notice that it is the policy of the Department to assure compliance with the Title VI Civil Rights Act of 1964, the Civil Rights Restoration Act of 1987, Executive Order 12898 Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, Executive Order 13166 Improving Access to Services for Persons with Limited English Proficiency, and related nondiscrimination statues and regulations in all programs and services. It is the Department's policy that no person shall, on the grounds of race, color, sex, age, income status, national origin, or disabilities be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program, activities, or services for which UCT receives Federal financial assistance.

Any person who believes they have been mistreated by an unlawful practice under Title VI has a right to file a formal complaint with UCT*, North Carolina Department of Transportation, United States Department of Transportation, Federal Transit Administration, and United States Department of Justice.

For more information on UCT's Title VI program or how to file a discrimination complaint contact:

Union County Transportation
T 704-283-3598
E transportation@unioncountync.gov

To obtain additional information on Title VI contact:

NC Department of Transportation Civil Rights and Business Development
1511 Mail Service Center
Raleigh, NC 27699-1511
T 919-733-2300

*Any such complaint must be in writing or in person with the UCT office within 180 days following the date of the alleged discrimination occurence.

Purpose

The purpose of this Policy is to ensure compliance with Title VI of the Civil Rights Act of 1964, and other applicable federal and state laws and their implementing regulations with respect to persons with limited English proficiency (LEP). Title VI of the Civil Rights Act of 1964 prohibits discrimination based on the ground of race, color or national origin by any entity receiving federal financial assistance. Administrative methods or procedures, which have the effect of subjecting individuals to discrimination or defeating the objectives of these regulations, are prohibited.

In order to avoid discrimination on the grounds of national origin, Union County Transportation (UCT) must take adequate steps to ensure that their policies and procedures do not deny or have the effect of denying LEP individuals with equal access to benefits and services for which such persons qualify.

Providing Service to LEP Individuals

UCT posts and maintains brochures and stickers in regularly encountered languages other than English at UCT's office, on the website, and on vehicles. UCT also offers LEP individuals the option to speak through a telephone interpreter, which is provided at no cost.

Enforcement

Any person who believes they have been mistreated by an unlawful discriminatory practice under Title VI has a right to file a complaint in writing or in person with Union County Transportation at 1407 Airport Road, Monroe, NC 28110 within 180 days following the date of the alleged discrimination occurrence.

For information regarding opportunities to participate on the Transportation Advisory Board, contact the office of Union County Transportation: **Transportation@unioncountync.gov**

Appendix A



Appendix A

UNION COUNTY TRANSPORTATION

Appendix C

UNION COUNTY TRANSPORTATION

Summary of Cash Handling Procedures
Revised June 1, 2026

Funds received

Voluntary Contributions

Voluntary contributions are collected from those clients whose transportation is funded through the Home and Community Care Block Grant HCCBG (funding for aging service). They are received by mail or by the scheduled driver during transport. When the driver receives the donation, it is placed into an envelope, and the driver adds the client's name, date, dollar amount, and vehicle number.

At the end of the day, the envelopes are either given to the Administrative Professional II to check for completeness and accuracy or put in the locked box located in the Dispatch office. The cash box is emptied daily with all money put into a bank bag and placed in a locked container.

Contributions received from passengers whose trips are funded with HCCGB funds are required to remain anonymous due to restrictions from this funding source; therefore, we do not issue receipts unless requested, and we do not monitor the source from whom the donations are received or the amount received.

Fares

In FY2003, we began offering General Public Transportation with a fare being charged for this service. Since then, we can exercise the option of charging a fare for all Rural Operating Assistance Program (ROAP) trips being provided. This charge is subject to change based on available funding.

If the driver has any passengers that are required to pay a fare, the driver will see this information displayed on their manifest showing the passenger's trip information. It is the responsibility of the driver to receive that fare before departing with the client. The driver places the fare in an individual envelope with the client's name, date, dollar amount, and vehicle number notated.

At the end of the day, the envelopes are either given to the Administrative Professional II to check for completeness and accuracy or put in the locked box located in the Dispatch office. The cash box is emptied daily with all money put into a bank bag and placed in a locked container.

Once the deposit process is completed (see Deposit Procedures), the Administrative Professional II or another designee will then record the information on the ROAP spreadsheet as a RGP, EDTAP, or Employment trip for each individual client and ensure that the fare amounts are reconciled to the trips provided and that the client records remain accurate and up to date. If at any time a negative balance occurs, the Administrative Professional II or other appropriate designee will contact the client within two business days to inform them of the amount past due and make arrangements with the client so that the balance returns to zero.

In the event that the client's balance remains in the negative, the Administrative Professional II or other designee should notify those responsible for scheduling to assure that no future trips are scheduled until the balance is resolved. The designee who provides the information will also be responsible for contacting the client to make them aware that their transportation has been suspended until the matter is resolved. The Administrative Professional II is responsible for assuring that client fares do not go into the negative and should move forward to resolve these matters immediately. In the absence of the Administrative Professional II, other designees will be held to the same responsibilities as described

above. All requests for fare balances should be directed to the Administrative Professional II or designee, who should resolve the question/request within 24 hours.

Late Cancel Fee

Passengers are expected to cancel before 12:00 p.m. on the business day preceding their scheduled trip by calling the Transportation office. Late Cancel Fees are charged when a passenger cancels after that designated time. The charge is $2.00 per occurrence. The Analytical Specialist, or other designee, will mail a Late Cancel Notice to the address on record indicating the date of the occurrence and the expected payment process. Each late cancel will be recorded to the passenger's account and monitored for payment. If the rider accumulates more than $10 in late cancel fees, the Late Cancellation Suspension Notice is mailed to the address on record indicating that transportation services are suspended until payment is received. All suspensions are approved by the Director. This policy does not apply to Medicaid trips.

If the payment is received by a driver, it is placed into an envelope, and the driver adds the client's name, date, dollar amount, and vehicle number. At the end of the day, the envelopes are either given to the Administrative Professional II to check for completeness and accuracy or put in the locked box located in the Dispatch office. The cash box is emptied daily with all money put into a bank bag and placed in a locked container.

If a check is mailed to the office, it is stamped "For Deposit Only" and held in a locked container until the deposit process is started.

No Show Fee

A trip is considered a No Show when the driver arrives at the scheduled location and has made every reasonable effort to locate the passenger for the specified allotted time. The specified allotted time is three minutes beyond the arrival of the vehicle. Wheelchair passengers and frail elderly passengers are given five to seven minutes as a courtesy of the Transportation office. The driver will notify the UCT Dispatch office of the No Show. The Dispatcher, upon review of the situation, will determine if the passenger is a No Show. If it is determined to be a No Show the Dispatcher will record the trip as such and will cancel the return trip, if one had been scheduled.

The passenger will be charged a $10.00 No Show fee, per occurrence. A No Show First Warning Notice will be mailed to the address on record indicating the date of the occurrence, referencing the No Show Suspension policy, and the expected payment process. Each additional No Show will result in a No Show Notice being mailed. If the number of No Shows, within a certain time period as referenced in the No Show Suspension policy, has occurred a Suspension Notice will be mailed to the address on record indicating the “No Show” dates and the date the passenger will be reinstated, if applicable. Each No Show will be recorded to the passenger’s account and will be monitored for payment. If the rider accumulates $20 in No Show fees a Suspension Notice will be mailed to the address on record indicating the No Show dates unpaid and that transportation services are suspended until payment is received. The No Show policy does not apply to Medicaid trips. This process is managed by the Analytical Specialist or designee. All suspensions are approved by the Director.

The following No Show Suspension policy applies to all passengers whose trips are not Medicaid:

- 3 No Shows within any 90-day period (first offense) will result in a 30-day suspension.
- 3 additional No Shows within any 90-day period (second offense) will result in a 60-day suspension.
- 3 additional No Shows within any 90-day period (third offense) will result in a 90-day suspension.
- 3 additional No Shows within any 90-day period (fourth offense) could result in permanent

suspension.

If the payment is received by a driver, it is placed into an envelope, and the driver adds the client's name, date, dollar amount, and vehicle number. At the end of the day, the envelopes are either given to the Administrative Professional II to check for completeness and accuracy or put in the locked box located in the Dispatch office. The cash box is emptied daily with all money put into a bank bag and placed in a locked container.

If a check is mailed to the office, it is stamped "For Deposit Only" and held in a locked container until the deposit process is started.

Payments from Outside Agencies

Another source of revenue is the payment received from outside agencies who purchase our services and are billed monthly at a per trip charge. These funds are paid by check and are received by mail at our office location. When the checks are received, they will be immediately stamped “For Deposit Only” and held in a locked container until the deposit process is started.

Payments from Government Agencies/Grants

Another source of revenue is the payment received from various grants that reimburse us for specific administrative costs incurred or other operating expenses. These can be on a monthly or quarterly basis. These payments may be in the form of checks mailed to our office location. When the checks are received, they will be immediately stamped “For Deposit Only” and held in a locked container until the deposit process is started.

Deposit Procedures

The preparation of the deposit is completed by either the Administrative Professional II, Reservation Technician, or Analytical Specialist. The staff member will count the cash and checks and complete the breakdown of the currency on the Deposit Count slip. Then they will note the totals on the deposit slip, which is completed in duplicate and initialed. Next, another staff member will count the cash and checks to confirm the amount and initial both deposit slips and place deposit in a locked deposit bag. Once completed, the Analytical Specialist or the Administrative Professional II will complete the Transportation Logistics Support Form requesting a deposit be completed for Transportation. An approved courier will sign for the deposit along with a member of the Transportation staff. Only deposits of $500.00 or more are required to be taken to the bank that day. The internal policy for the Transportation office is $250.00. Cash and checks received by the Administrative Professional II waiting to be deposited are held in a locked container.

When the validated deposit slip is returned, the Administrative Professional II, or other member of the staff who prepared the deposit, will include the deposit amount in the Excel file labeled Transportation Revenue Report, identified by the date of deposit, account code, and dollar amount. The Excel file will track the daily deposits made for the month and is emailed to the Finance Department contact one to two business days after the last day of the month.

A copy of the monthly deposit report and the deposit slip will be maintained on file in the Transportation office to serve as backup documentation for the following:

- HCCBG figures will be reported monthly to the Division on Aging. These figures are one area of the review during our yearly program assessment for Home and Community Care Block Grant (HCCBG) funding by Centralina Council of Governments.

Appendix C

- A copy will be maintained as verification for NCDOT of use of RGP, EDTAP, or Employment funding and as evidence of the RGP local match being earned.

Appendix D

Union County Transportation

Comment Form

Select Language

Powered by Google Translate (https://translate.google.com)

Fields marked with an asterisk (*) are required

Union County Division of Transportation is committed to providing you with safe and reliable transportation and we want your feedback. Please use this form for suggestions, compliments, and complaints. You may also call us at 704-292-2511, visit our Customer Service Center at 1407 Airport Rd, Monroe, NC 28110, or contact us by email or U.S. postal mail at the addresses below. Please make sure to provide us with your contact information in order to receive a response. Union County Division of Transportation, Theresa Torres,1407 Airport Rd, Monroe, NC 28110, 704-292-2598, and theresa.torres@unioncountync.gov

Section I: Type of Comment

Date: Date will be captured on form submission

Please select type of complaint:* (?) ☐ ADA ☐ Title VI (https://lfportal.unioncountync.gov/Forms/UCTADATitleVIComplaint) ☐ General

Please select type of comment:* ○ Compliment ○ Suggestion ○ Complaint

Section II: Contact Information

Name:

Phone Number: ex (555) 555-5555

Email:

Section III: Comment Details

Date of Occurrence:

Time of Occurrence: AM

Name of Employee(s) Involved:

Vehicle Number:

Direction of Travel:

Location of Incident:

Mobility Aid Used (if any):

If above information is unknown, please provide other descriptive information to help identify the employee:

Description of Incident or Message:

Section IV: Follow Up

May we contact you if we need more details or information?

What is the best way to reach you? (Choose One)

If a phone call is preferred, what is the best day and time to reach you?

Submit

Union County Transportation Customer Survey

Union County Transportation wants to exceed your expectations. As your service provider, we want to be welcoming, respectful and timely. We encourage honest feedback. We look forward to learning about your experience with our agency.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

* Required

1. What is the reason for your visit today? *

- ◯ Transportation

2. Please choose the best option that describes your sentiment regarding your experience. *

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The service provided by Union County staff was professional.	◯	◯	◯	◯	◯
Union County staff addressed my request or concern in a fair manner.	◯	◯	◯	◯	◯
Union County staff listened to understand my needs.	◯	◯	◯	◯	◯

Appendix W

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
Union County staff provided me with clear and helpful information.	◯	◯	◯	◯	◯
Union County staff explored options for addressing my needs.	◯	◯	◯	◯	◯
I trust Union County Transportation t o serve my needs effectively.	◯	◯	◯	◯	◯

3. Please choose the best option that describes your sentiment regarding your experience. *

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The hours of operation met my needs.	◯	◯	◯	◯	◯
My wait time was acceptable.	◯	◯	◯	◯	◯
The Union County Transportation website had information that was useful to me.	◯	◯	◯	◯	◯

4. Please share any additional details, especially if you selected 'Disagree' or 'Strongly Disagree,' to help us better understand your experience and improve our service.

Enter your answer

Appendix W

5. If a Union County Transportation employee provided you with exceptional service, please enter their name in the space below.

Enter your answer



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File #: 26-396 **Agenda Date:** 7/20/2026

TITLE:

Grant Application - Transportation FY2027 ConCPT Grant Application

INFORMATION CONTACT:

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

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 purpose of the ConCPT funding's coordination portion (CO) is to enhance coordination among NCDOT IMD grantees. Funding will be provided for coordination activities in which two or more public transportation grantees (including community colleges or universities) agree to establish formal relationships to maximize resources, achieve efficiencies, and improve access to public transportation. The primary goal of this ConCPT funding is to establish formal relationships between the participants for long-distance routes.

This funding will be used for both operating and capital expenses to cover coordination services with Anson County Transportation and CATS 74X. It will also be used to cover the cost of replacement tablets for our vehicles and a new Operations, Administrative, and Safety Management System that will replace the current Access system (HUB) used by transportation today.

FINANCIAL IMPACT:

A total of $266,000 in grant funds (if approved as submitted), which includes 100% of State share and a Local match of 0%.

PUBLIC TRANSPORTATION PROGRAM RESOLUTION

FY27 RESOLUTION

Section 5311 (including ADTAP), 5310, 5339, 5307 and applicable State funding, or combination thereof.

Applicant seeking permission to apply for Public Transportation Program funding, enter into agreement with the North Carolina Department of Transportation, provide the necessary assurances and the required local match.

A motion was made by (*Board Member's Name*) _____ and seconded by (*Board Member's Name or N/A, if not required*) _____ for the adoption of the following resolution, and upon being put to a vote was duly adopted.

WHEREAS, Article 2B of Chapter 136 of the North Carolina General Statutes and the Governor of North Carolina have designated the North Carolina Department of Transportation (NCDOT) as the agency responsible for administering federal and state public transportation funds; and

WHEREAS, the North Carolina Department of Transportation will apply for a grant from the US Department of Transportation, Federal Transit Administration and receives funds from the North Carolina General Assembly to provide assistance for rural public transportation projects; and

WHEREAS, the purpose of these transportation funds is to provide grant monies to local agencies for the provision of rural, small urban, and urban public transportation services consistent with the policy requirements of each funding source for planning, community and agency involvement, service design, service alternatives, training and conference participation, reporting and other requirements (drug and alcohol testing policy and program, disadvantaged business enterprise program, and fully allocated costs analysis); and

WHEREAS, the funds applied for may be Administrative, Operating, Planning, or Capital funds and will have different percentages of federal, state, and local funds.

WHEREAS, non-Community Transportation applicants may apply for funding for "purchase-of-service" projects under the Capital Purchase of Service budget, Section 5310 program.

WHEREAS, (*Legal Name of Applicant*) Union County hereby assures and certifies that it will provide the required local matching funds; that its staff has the technical capacity to implement and manage the project(s), prepare required reports, obtain required training, attend meetings and conferences; and agrees to comply with the federal and state statutes, regulations, executive orders, Section 5333 (b) Warranty, and all administrative

requirements related to the applications made to and grants received from the Federal Transit Administration, as well as the provisions of Section 1001 of Title 18, U. S. C.

WHEREAS, the applicant has or will provide all annual certifications and assurances to the State of North Carolina required for the project;

NOW, THEREFORE, be it resolved that the (Authorized Official's Title)* County Manager of (Name of Applicant's Governing Body) Union County is hereby authorized to submit grant application (s) for federal and state funding in response to NCDOT's calls for projects, make the necessary assurances and certifications and be empowered to enter into an agreement with the NCDOT to provide rural, small urban, and urban public transportation services.

I (*Certifying Official's Name*)* Lynn West (*Certifying Official's Title*) *Clerk of the Board of Commissioners* do hereby certify that the above is a true and correct copy of an excerpt from the minutes of a meeting of the (*Name of Applicant's Governing Board*) Union County Board of Commissioners duly held on the 20th day of July, 2026.

_____

Signature of Certifying Official

Note that the authorized official, certifying official, and notary public should be three separate individuals.

Seal Subscribed and sworn to me (date) _____

Affix Notary Seal Here

_____

*Notary Public **

_____

Printed Name and Address

My commission expires (date) _____

LOCAL SHARE CERTIFICATION FOR FUNDING

Union County
(Legal Name of Applicant)

Requested Funding Amounts

Project	Total Amount	Local Share**
5311 Administrative	$ _____	$ _____ (15%)
5311 Operating (No State Match)	$ _____	$ _____ (50%)
5310 Operating (No State Match)	$ _____	$ _____ (50%)
Combined Capital	$ _____	$ _____ (10%)
Mobility Management	$ _____	$ _____ (10%)
5310 Capital Purchase of Service	$ _____	$ _____ (10%)
ConCPT	$ **266,000**	$ **0** (0%)
Capital Cost of Contracting	$ _____	$ _____ (_____%)
Travelers' Aid	$ _____	$ _____ (50%)
_____	$ _____	$ _____ (_____%)
_____	$ _____	$ _____ (_____%)
_____	$ _____	$ _____ (_____%)

Funding programs covered are 5311, 5310, 5339 Bus and Bus Facilities, 5307 (Small fixed route, regional, and consolidated urban-rural systems)

TOTAL	$ **266,000**	$ **0**
	Total Funding Requests	**Total Local Share**

****NOTE: Applicants should be prepared for the entire Local Share amount in the event State funding is not available.**

The Local Share is available from the following sources:

Source of Funds	Apply to Grant	Amount
General Fund	ConCPT Grant	$ 0
TOTAL		$ 0

**** Fare box revenue is not an applicable source for local share funding**

I, the undersigned representing *(Legal Name of Applicant)* **Union County** do hereby certify to the North Carolina Department of Transportation, that the required local funds for the FY2027 Community Transportation Program and 5307 Governors Apportionment will be available as of **July 1, 2026**, which has a period of performance of July 1, 2026 – June 30, 2027.

_____
Signature of Authorized Official

Brian W. Matthews, County Manager
Type Name and Title of Authorized Official

_____
Date

File #: 26-398 **Agenda Date:** 7/20/2026

TITLE:

Contract - Daymark Recovery Services, Inc.

INFORMATION CONTACT:

Janet Payne, Human Services Agency, Administrator, 704-296-4349

ACTION REQUESTED:

Authorize the County Manager to 1) negotiate and execute an agreement with Daymark Recovery Services, Inc. in the amount of $714,850.00, 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 at the County Manager's discretion.

PRIOR BOARD ACTIONS:

1) September 3, 2019, Regular Meeting, Agenda Item # 3 - Approval of original contract
2) June 15, 2020, Regular Meeting, Agenda Item # 12 - Approval of 1st Amendment
3) August 16, 2021, Regular Meeting, Agenda Item # 15 - Approval of 2nd Amendment
4) September 19, 2022, Regular Meeting, Agenda Item # 22-660 - Approval of 3rd Amendment
5) August 14, 2023, Regular Meeting, Agenda Item # 23-528 - Approval of 4th Amendment
6) June 17, 2024, Regular Meeting, Agenda Item # 24-425 - Approval of New Contract #8989

BACKGROUND:

As part of a continued effort to ensure that the funding allocated for behavioral health services in Union County is directed to areas of priority, County staff have worked with Daymark Recovery Solutions, Inc. to establish a direct contract relationship. For many years, Union County has provided funding for local behavioral health services to community service providers. This new agreement, amounting to $714,850.00, with $60,000.00 coming directly from ABC taxes and the rest from County funds, will provide more direct oversight by the County to ensure that the locally allocated funds are managed as desired. Additionally, it will offer greater flexibility in addressing any issues that may arise, thus enhancing the effectiveness and responsiveness of the services provided.

FINANCIAL IMPACT:

Funding for this contract is included in the FY2027 Operating & Capital Budget adopted by the Board of County Commissioners.

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DAYMARK
Recovery Services

CONTRACT FOR OUTPATIENT PSYCHIATRIC SERVICES
BY AND BETWEEN
DAYMARK RECOVERY SERVICES, INC.

AND

UNION COUNTY, NORTH CAROLINA

THIS CONTRACT shall commence on the 1st day of July, 2026, and shall cease on the 30th day of June, 2027, entered into by Daymark Recovery Services, Inc., herein called CONTRACTOR, and Union County, herein called the PAYOR.

WHEREAS PAYOR requires mental health and substance abuse services to be delivered in Union County and has a maintenance of effort obligation to pay for a portion of these services, and CONTRACTOR is able to provide these services to PAYOR.

NOW THEREFORE, in consideration of mutual promises and covenants hereinafter set out, CONTRACTOR and PAYOR do hereby agree as follows:

ARTICLE I – RELATIONSHIP OF PARTIES

1. Assignment: The services covered by this Contract shall not be subcontracted or assigned without the prior written consent of the PAYOR.

2. No Authority to Bind PAYOR: CONTRACTOR has no authority to enter into contracts or agreements on behalf of PAYOR. This Contract does not create a partnership or any form of agency between the parties.

ARTICLE II – RESPONSIBILITIES OF THE CONTRACTOR AND COMPANY

A. RESPONSIBILITIES OF THE CONTRACTOR:

1. CONTRACTOR agrees that all services under this Contract shall be provided without regard to race, religion, creed, sex, nationality, age, disability, or ability to pay in accordance with all federal and state regulations pertaining to discrimination, particularly TITLE VI of the Civil Rights Act of 1964.

2. CONTRACTOR agrees to meet and maintain all standards for approval, certification and/or licensure by appropriate local, state, federal and other agencies exercising such PAYOR over the services to be rendered under the terms of this Contract. CONTRACTOR shall

notify PAYOR in the event of ANY adverse action that may result in the CONTRACTOR being unable to perform the duties of this Contract.

3. The types of services to be provided by the CONTRACTOR are defined in the attached Exhibit A, "Definition of Services Performed by Daymark Recovery Services in Union County." Exhibit A is incorporated herein by reference.

4. CONTRACTOR agrees to submit a monthly invoice to PAYOR to prompt payments in accordance with Articles I, II, and III of this Contract.

5. At CONTRACTOR's sole expense, CONTRACTOR shall procure and maintain the following minimum insurances with insurers authorized to do business in North Carolina and rated A-VII or better by A.M. Best, or as otherwise authorized by the Union County Risk Manager.

A. WORKERS' COMPENSATION
Statutory (coverage for three or more employees) limits covering all employees, including Employer's Liability with limits of:

$500,000	Each Accident
$500,000	Disease - Each Employee
$500,000	Disease - Policy Limit

B. COMMERCIAL GENERAL LIABILITY
Covering Ongoing and Completed Operations involved in this Agreement.

$2,000,000	General Aggregate
$2,000,000	Products/Completed Operations Aggregate
$1,000,000	Each Occurrence
$1,000,000	Personal and Advertising Injury Limit

C. PROFESSIONAL LIABILITY

$1,000,000	Claims Made

CONTRACTOR shall provide evidence of continuation or renewal of Professional Liability Insurance for a period of two (2) years following termination of the Agreement.

ADDITIONAL INSURANCE REQUIREMENTS

A. CONTRACTOR's General Liability policy shall be endorsed, specifically or generally, to include the following as Additional Insured:

UNION COUNTY, ITS OFFICERS, AGENTS AND EMPLOYEES ARE INCLUDED AS ADDITIONAL INSURED WITH RESPECTS TO THE

GENERAL LIABILITY INSURANCE POLICY FOR ACTS ASSOCIATED WITH BEHAVIORAL HEALTH SERVICES PERFORMED BY DAYMARK RECOVERY SERVICES, INC.

Additional Insured status for Completed Operations shall extend for a period of not less than three (3) years from the date of final payment.

B. Before commencement of any work or event, CONTRACTOR shall provide a Certificate of Insurance in satisfactory form as evidence of the insurances required above.

C. CONTRACTOR shall have no right of recovery or subrogation against Union County
(including its officers, agents and employees).

D. It is the intention of the parties that the insurance policies afforded by CONTRACTOR shall protect both parties and be primary and non-contributory coverage for any and all losses covered by the above-described insurance.

E. Union County shall have no liability with respect to CONTRACTOR's personal property whether insured or not insured. Any deductible or self-insured retention is the sole responsibility of CONTRACTOR.

F. Notwithstanding the notification requirements of the Insurer, CONTRACTOR hereby agrees to notify PAYOR's Risk Manager at 500 North Main Street, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein. PAYOR, in its sole discretion, may deem failure to provide such notice as a breach of this Agreement.

G. The Certificate of Insurance should note in the Description of Operations the following:

Department: County Manager's Office
Contract #: 8989

H. Insurance procured by CONTRACTOR shall not reduce nor limit CONTRACTOR's contractual obligation to indemnify, save harmless and defend Union County for claims made or suits brought which result from or are in connection with the performance of this Agreement.

I. Certificate Holder shall be listed as follows:

Union County
Attention: Risk Manager
500 North Main Street
Monroe, NC 28112

J. If CONTRACTOR is authorized to assign or subcontract any of its rights or duties hereunder and in fact does so, CONTRACTOR shall ensure that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of the required insurances coverage and provision of certificate(s) of insurance and additional insured endorsement(s), in proper form prior to commencement of services.

6. CONTRACTOR agrees to properly prepare and forward, on timely basis, any and all forms, reports, etc., as may be requested by the PAYOR that are within industry standard of data collection and not proprietary.

7. CONTRACTOR agrees to comply with all applicable policies and procedures of the PAYOR.

8. CONTRACTOR agrees to comply with all confidentiality laws/regulations with regard to the protection of consumer information.

9. CONTRACTOR understands that as a contractor for Union County, they are not eligible for, and shall not participate in, any employee pension, health or other fringe benefit plan of PAYOR.

10. CONTRACTOR also agrees that any requirements regarding Worker's Compensation coverage is the sole responsibility of CONTRACTOR. No Worker's Compensation insurance
shall be obtained by PAYOR concerning CONTRACTOR and the employees of CONTRACTOR.

B. RESPONSIBILITIES OF THE PAYOR:

1. PAYOR agrees to provide in writing what services are to be purchased.

2. PAYOR agrees to provide in writing what documentation and outcomes are desired to be reported.

3. PAYOR agrees to make payments in monthly increments in accordance with Articles I, II, and III of this Contract upon receipt of an accurate invoice from CONTRACTOR.

C. RESPONSIBILITIES OF BOTH THE CONTRACTOR AND THE PAYOR:

1. CONTRACTOR and PAYOR agree to share appropriate confidential information where pertinent to the patient diagnosis, treatment, care and/or rehabilitation in compliance with HIPAA Standards, which essentially means all data information will be in non-identifying format unless it is a direct referral or coordination of care with a Union County operated human or healthcare service.

2. MODIFICATION. This Contract may only be modified in writing, executed by both parties.

3. REVIEW: This Contract will be reviewed at least annually and possibly every quarter. It is recommended that reviews happen at a minimum of every six months. Changes to the Contract are possible, post 30 days of the review period.

ARTICLE III – CONDITIONS OF PAYMENT

CONTRACTOR Services shall be available to Union County Residents at all CONTRACTOR locations. Services may be purchased individually or as a whole given the number of indigent patients served and poor State/Federal Reimbursement Rates. However, the CONTRACTOR agrees to produce profit and loss statements by service or collective services delivered to Union County. PAYOR Funding shall be spent on Union County Residents and for service areas not adequately covered by other private, State, or federal payors.

Purchased Services	Annual Payment	Outcomes Desired
Walk-in Clinic	$278,147	1. Hours of operation will be Monday through Friday 8am to 5pm, excluding holidays and adverse weather. 2. No one will be turned away based on inability to pay. 3. All efforts will be made to refer persons to an emergency room setting only if medically necessary. 4. Data on Urgent, Emergent, Routine Appointments and hospital diversions will be kept monthly. 5. Must have the ability to perform first opinion evaluation on involuntary commitments. 6. Diversion data must show flat or reduction in trend lines. 7. Appointments and walk-ins must be available for all patients no more than two hours post a request during normal business hours.
Outpatient Preventative Care	$0	1. Patients will have received evidenced or literature based treatment. 2. No patient shall be denied a group therapy service based on an inability to pay. However, every effort will be made to collect copays and deductibles. 3. Patients may be denied future appointments due to excessive noshows or non-compliance but must be offered an alternative treatment. 4. Services will include medication assisted treatment for opiates and other substance dependence addictions. 5. Services will include referral to other agencies when desired by the patient or medically necessary. 6. Availability to start outpatient care post hospital discharge will be available no more than seven days post a hospital discharge. 7. Union County Residents will have the ability to seek services at any of the CONTRACTOR's locations Statewide, regardless of their ability to pay. 8. Tailored Care Management (TCM) services will be offered to all persons who are eligible and assigned to Daymark as their TCM agency.

Medication Management	$153,449	1. Psychiatric providers will be on staff in sufficient enough hours to provide timely access to care and follow up care when psychiatric medication is needed. This would be within 7 days post a hospital discharge and up to four weeks for a routine appointment. 2. Nursing services will be available to perform wellness management treatments as well as patient assistance programs for indigent medications. 3. Because most providers in North Carolina, including Union County, do not have adequate psychiatric services, the CONTRACTOR will allow split care when medically appropriate. Meaning, a different provider that may be providing a lucrative service may refer to the CONTRACTOR's medical team, that historically loses money, for psychiatric care of their patient.
Mobile Crisis Management	$118,455	1. Mobile Crisis Management will be provided in Union County.
Facility Based Crisis (FBC)	$88,842 service $75,957 medicine	1. Union County Residents may be served at any of the CONTRACTOR's facility-based crisis units if they have Medicaid or are indigent (not having any other form of insurance). 2. Union County Residents seeking care in an FBC will receive medically necessary medications during the inpatient stay at no cost to them. They may also receive medications post discharge.
Technology Integrated Care	$0	1. All Medicaid Eligible Union County Residents will have whole person care coordinated by the CONTRACTOR through the ICARE Solution. 2. The CONTRACTOR will track at a minimum the MIPS Score of qualifying patients.
Enhanced Services	$0	1. Enhanced services generally are not in need of county or state fiscal support and will be available for Union County Residents. If the CONTRACTOR does not provide the service, the patient may be referred to another provider.
Total Annual Funding	$714,850	

The total annual funding of $714,850 is used for Union County residents that are indigent or underinsured and are in need of medically necessary behavioral health services. While all purchased services listed above are important, funding is prioritized for the following services: Walk-in Clinic, Medication Management, Mobile Crisis Management, and Facility Based Crisis (FBC).

A performance report documenting services provided will be provided by the CONTRACTOR to the PAYOR at least annually. Additionally, CONTRACTOR will provide ad-hoc reports upon request by the PAYOR.

Note: Upon mutual agreement, both the CONTRACTOR and PAYOR may elect to allocate funding between specific cost centers should service needs change.

In the event that services provided to Union County Residents are adequately funded by Private, State and Federal Payors and County Funding is not needed, (as indicated by profits exceeding expenses, plus 5% for cash flow) the CONTRACTOR shall notify the PAYOR and give the PAYOR reinvestment options. The PAYOR may opt to recoup or withhold funding not to exceed taking the CONTRACTOR below breakeven, plus 5% profit.

ARTICLE IV – HOLD HARMLESS

The CONTRACTOR is not an officer, employee, subcontractor or agent of PAYOR. The CONTRACTOR is an independent contractor of PAYOR. The CONTRACTOR further agrees to obey all State and Federal statues, rules, and regulations, which are applicable to the operation of the program referred to herein. CONTRACTOR agrees to protect, defend, indemnify and hold PAYOR, its officers, employees and agents free and harmless from and against any and all losses, penalties, damages, settlements, costs, charges, professional fees or other expenses or liabilities of every kind and character arising out of or relating to any and all claims, liens, demands, obligations, actions, proceedings, or causes of action of every kind in connection with or arising out of this Agreement and/or the performance hereof that are due, in whole or in part, to the negligence of the CONTRACTOR, its officers, employees, subcontractors or agents. CONTRACTOR further agrees to investigate, handle, respond to, provide defense for, and defend the same at its sole expense and agrees to bear all other costs and expenses related thereto.

ARTICLE V – SUSPENSION OR TERMINATION

This Contract may be terminated or suspended by mutual consent of both parties at any time, or 60 days after either party provides written notice of intent to terminate.

ARTICLE VI – DISPUTE RESOLUTION

The PAYOR employee(s) designated to do so by the County Manager shall administer the Contract. If a dispute arises between the PAYOR and the CONTRACTOR, the designated employee(s) shall resolve it.

ARTICLE VII – OTHER REQUIREMENTS

1. Nonproprietary Information: To the extent consistent with applicable law, the PAYOR shall not publish or disseminate any proprietary business material either printed or electronically transmitted (including photographs, films, and public announcements) without the prior written consent of the CONTRACTOR. Any documents, reports, or other products, with the exception of any and all proprietary business papers and documents, developed in connection with the performance of the Contract, shall be in the public domain and shall not be copyrighted or marketed for profit by any individual, or other entity.

   Notwithstanding this Article VII, Section 1, or anything else in this Agreement to the contrary, CONTRACTOR acknowledges that PAYOR is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act, and that this Agreement, including all documents incorporated by reference, shall be a public record as defined in such Act, and as such, will be open to public disclosure and copying. Any other specific information that is claimed by CONTRACTOR to be confidential or proprietary must be clearly identified as such by

CONTRACTOR. To the extent consistent with the Public Records Act, PAYOR shall maintain the confidentiality of all such information marked confidential or proprietary. If a request is made to view CONTRACTOR's proprietary information, PAYOR will notify CONTRACTOR of the request and of the date that such records will be released to the requester unless CONTRACTOR obtains a court order enjoining that disclosure. If CONTRACTOR fails to obtain the court order enjoining disclosure, PAYOR will release the requested information on the date specified.

2. HIPAA: For some purposes of this Contract, other than treatment, the CONTRACTOR may be considered a "Business Associate" of the PAYOR as defined under the Health Insurance Portability and Accountability Act of 1996 (HIPAA), and in those instances the CONTRACTOR will comply with ALL applicable HIPAA regulations for Business Associates. The CONTRACTOR and PAYOR agree to the terms of the attached Business Associate Agreement, which is incorporated herein by reference.

   Although CONTRACTOR may be at times considered a "Business Associate" of PAYOR for purposes of HIPAA, CONTRACTOR shall in no way otherwise be considered anything but an independent contractor of PAYOR.

3. Choice of Law/Forum: This agreement shall be interpreted in accordance with the laws of the State of North Carolina. The venue for all legal actions upon this Contract shall be in the State Courts of Davidson, Cabarrus, Stanly, Rowan or Union Counties, or the U. S. District Court for the Western District of North Carolina, Charlotte Division.

4. In the event that Federal and State laws should be amended or judicially interpreted so as to render the fulfillment of this Contract on the part of either party not feasible or impossible, both the CONTRACTOR and the PAYOR shall be discharged from further obligation under the terms of this Contract, except for equitable settlement of the respective obligations up to the date of termination.

5. Counterparts: The Contract shall be executed in two counterparts, each of which will be deemed an original. This Contract is executed in the State of North Carolina and shall be interpreted pursuant to the laws thereof. Any and all words in this Contract shall otherwise be given their normal meaning.

Charge to Account Number: _____

Contract Budget Amount: $ 714,850

Pay Frequency: Monthly

Begin Date: July 1, 2026 End Date: June 30, 2027
(Note: Contract Period is to fall within Fiscal Year Dates July 1 – June 30)

Daymark Tax ID: 02-0707661
Daymark Mailing Address: 2129 Statesville Blvd, Salisbury, NC 28147
Daymark Telephone: 704-210-1233; Fax 704-636-8818

PAYOR Tax ID:
PAYOR Mailing Address:
PAYOR Telephone:

Daymark Recovery Service, Inc.

PAYOR Email:

IN WITNESS WHEREOF the parties hereto have caused this contract to be signed by PAYOR and CONTRACTOR as by law provided, the day, the month, and year first above written.

SIGNATURE PAGE

This contract is being renewed based on the satisfactory job performance for the prior year of service.

Signature for Daymark Recovery Services, Inc.:

Title: CFO

Date: 6/15/26

Signature for Union County:

Title: County Manager

Date: _____

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

Approved as to Legal Form RLM

Deputy Finance Officer

Exhibit A

Definition of Services Performed by Daymark Recovery Services in Union County

I. Advance Access: Walk-in Services

Contractually these services are known as the Walk-in Clinic which is made up of three components that are:

a. Advance Access: This is the walk-in service that Union County has been funding. Similar to an urgent care service, this clinic may see walk-in or appointment driven patients. Most patients are walk-in or call for same day appointments. The required time to see a walk-in is two hours but we average less than 20 minutes. The clinic also serves as immediate and often frequent follow up post a crisis event. This is done so the person has somewhere to go other than the emergency room until their symptoms are resolved. The service provides three essential services. They are assessment, brief intervention (can be medical or clinical) and disposition/referral (can take hours). The only part billable to a payer is the assessment code, leaving all other work unreimbursed. The service is for all sexes, ages and substance abuse and mental health illnesses. The service is open five days a week and extended hours in some counties. Specific to Union County the service is provided five days a week from (8am to

5pm) in one location and is a 24/7/365 service within our facility based crisis unit in Union County. The service is for all sexes, ages and substance abuse and mental health illnesses.

b. Prevention Services: These are routine follow individual and group therapies. The service is for all sexes, ages and substance abuse and mental health illnesses. The service is open five days per week and has some extended hours as our patients need the flexibility for appointments. These services also include Tailored Care Management (TCM) Services for those eligible Union County Residents.
c. Medication Management: This both scheduled and on demand assessment and treatment as medically necessary through medication provided by a psychiatrist or lower level provider under a psychiatrist. This service also provides indigent medication when needed. The service codes available to bill do not cover the cost of this service, nor has it for 40 years in the public system. The service is available five days per week, have back up call coverage 24/7/365 and available to all sexes, age groups and for persons with mental and substance abuse illnesses. The service relies heavily on State and county dollars for support.

II. Outpatient Preventative Care:

This service is part of the Advance Access Service Clinics. The service provides routine and group therapies on a scheduled basis for persons with mental health and substance abuse illnesses. The service is available to all sexes and for persons school age and up. This service also includes Tailored Care Management (TCM) Services for those eligible Union County Residents.

III. Medication Management:

This service is part of the Advance Access clinic. It is normally a preventative service but it can be a crisis service if the medical provider feels medication is needed as an emergency. The service is performed by Psychiatrists and lower level providers like Psychiatric Nurses. The service also provides around the clock consultation, nursing services and indigent medication programing.

IV. Mobile Crisis Management (also known as Mobile Engagement Team or MET)

The mobile engagement team (MET) is a service that is provided to persons of all ages that are in a mental health or substance abuse crisis. The team serves a disproportional share of indigent patients. The service is normally provided outside of the office and in the community setting. The service relies heavily on State and County Dollars for support.

V. Facility Based Crisis:

The service can provide inpatient psychiatric care and detox for persons in acute substance abuse and mental health crisis. The State and Medicaid Rates do not fully fiscally support the service and State and County dollars are imperative to keep the service open.

VI. Technology Integrated Care:

North Carolina has been unsuccessful in integrating behavioral health and physical healthcare on a wholesale basis. Daymark deploys both ICARE (Integrated Care Alerts for Research and Engagement) and CarEquality as an integrated care tool. This allows Daymark to integrate the care of all patients that have a physical health provider through our office by using and sending medical

information through the interoperability of our information technology systems. Money to support this system is provided through the federal Health Information Technology for Economic and Clinical Health ("HITECH") Act.

VII. Enhanced Services:

These services consist of services like Intensive In-home (IIH), Assertive Community Treatment Team (ACTT) and similar services that are not supported by County Dollars.

UNION COUNTY
north carolina

Memorandum

To: Brian Matthews. County Manager

From: Janet Payne, Human Services Agency Administrator
Union County, North Carolina

CC: Corey Brooks, Procurement Director

Date: June 29, 2026

Re: Exemption of RFP Process for Daymark Recovery Solutions. Inc.

Pursuant to Union County Procurement Policy. Section 3.5. Procurement of Other Services. item 3.5.3., which in part reads "...Because there are no statutory requirements applicable to the procurement of such services, an Assistant County Manager (ACM) or the County Manager may exempt a service from the RFP process for good cause and when in the best interests of Union County."

As part of a continued effort to ensure that the funding allocated for behavioral health services in Union County is directed to areas of priority. County staff have worked with Daymark Recovery Solutions. Inc. to establish a direct contract relationship. For many years. Union County has provided funding for local behavioral health services to community service providers. This new agreement. amounting to $714,850.00. with $60,000.00 coming directly from ABC taxes and the rest from County funds, will provide more direct oversight by the County to ensure that the locally allocated funds are managed as desired. Additionally, it will offer greater flexibility in addressing any issues that may arise, thus enhancing the effectiveness and responsiveness of the services provided.

Brian W Matthews

Brian Matthews, County Manager

7/6/26

Date

File #: 26-399 **Agenda Date:** 7/20/2026

TITLE:

Contract Amendment - FY2027 74X CATS Express Bus Service

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to approve the Third Amendment to the Union County Regional Transit Services Agreement between the City of Charlotte and Union County.

PRIOR BOARD ACTIONS:

1) April 17, 2023, Regular Meeting, Agenda Item # 23-122 - Presentation of 74 Express Bus Service Partnership Update- Action cancel service
2) June 19, 2023, Regular Meeting, Agenda Item #23-387 - Presentation of 74 Express Bus Service Partnership Update-Action add back Indian Trail stop
3) February 5, 2024, Regular Meeting Agenda Item #24-070 - FY2024- Contract CATS Express Bus Service
4) July 15, 2024, Regular Meeting Agenda Item #24-476 - FY2025- Contract CATS Express Bus Service
5) July 14, 2025, Regular Meeting Agenda Item #25-431 - FY2026 - Contract CATS/MPTA Express Bus Service

BACKGROUND:

The Charlotte Area Transit System (CATS)/Metropolitan Public Transportation Authority (MPTA) provides peak-hour weekday express bus service from Indian Trail to uptown Charlotte, based on terms set forth in a Regional Transit Services Agreement between the City of Charlotte/Metropolitan Public Transportation Authority (MPTA) and Union County. Prior to October 2023, the express bus included stops in both Monroe and Indian Trail. The service changed to include only stops in Indian Trail starting October 1, 2023. This contract amendment is the third of four potential one-year renewal extensions and will cover the period from July 1, 2026, to June 30, 2027.

Union County is obligated under this contract to pay a portion of the operating costs, including administrative expenses, which represent 50% of the net cost of service after deducting fare revenue. Union County's third amendment FY2027 ($121,613) will be paid $20,889 by Indian Trail, leaving $39,918 to be covered by budgeted County general funds, and the remaining 50% to be covered by Federal Transit Administration (FTA) Section 5307 urban transit grant funding.

FINANCIAL IMPACT:

A maximum of $121,613 in payments to CATS will be made. $20,889 will be paid by Indian Trail,

leaving $39,918 to be covered by FY2027 budgeted general funds, and $60,807 will be reimbursed through Section 5307 grant funds.

UNION COUNTY CUSTOMER ACCOUNT #R000011843
New Contract #SCON2510001640
Original Contract #2024000318
Amendment #3
Vendor #129787

STATE OF NORTH CAROLINA
COUNTY OF MECKLENBURG

THIRD AMENDMENT TO THE INTERLOCAL TRANSIT SERVICES AGREEMENT

THIS THIRD AMENDMENT TO THE INTERLOCAL TRANSIT SERVICES AGREEMENT (this "Third Amendment") is made and entered into as of the date of the last signature below and is effective as of July 1, 2026, by and between Union County, a political subdivision of the State of North Carolina (hereinafter referred to as "Union County" or the "Partner"), and the City of Charlotte, a North Carolina municipal corporation (the "City").

Statement of Background and Intent

A. The City of Charlotte and Union County entered into an Interlocal Transit Services Agreement, effective as of October 1, 2023, and assigned City of Charlotte original contract number 2024000318 (the "Agreement"), pursuant to which the City agreed to provide regional commuter bus services between Charlotte and Union County.

B. Section 8.1 of the agreement, entitled "Term" states that Union County and City of Charlotte have the option to extend the agreement for up to four (4) years beyond the initial one (1) year term.

C. Effective as of July 1, 2024, the parties executed a First Amendment to the Agreement, which extended the Agreement for the first of four (4) one-year renewal terms and made other changes to the Agreement.

D. Effective as of July 1, 2025, the parties executed a Second Amendment to the Agreement, which extended the term of the Agreement by the second of four (4) one-year renewal terms, updated costs in Section 5.3 of the Agreement for Fiscal Year 2026, and incorporated certain other changes.

E. The parties now desire, as of July 1, 2026, to further amend the Agreement to: (i) extend the term of the Agreement by the third of four (4) one-year renewal terms, (ii) update costs in Section 5.3 of the Agreement for Fiscal Year 2027, (iii) update the contract number due to the City installing a new system, and (iv) incorporate certain other changes.

NOW, THEREFORE, in consideration of the mutual covenants and agreements contained herein, the parties hereby agree to the following:

A G R E E M E N T

1. The terms of the Agreement are restated by and incorporated into this Third Amendment by reference.
2. Defined terms used in this Third Amendment shall have the same meaning as are assigned to such terms in the Agreement.
3. The parties acknowledge and agree that the Agreement has been in effect at all times from October 1, 2023 through the present, and that all purchases made during the period from October 1, 2023 through the date of this Third Amendment are covered by the Agreement.
4. This Third Amendment extends the Term of the Agreement by the third of four (4) one-year renewal terms, so that the Agreement will now expire on June 30, 2027.
5. This Third Amendment closes out the original contract number #2024000318 and incorporates the new contract number of SCON2510001640 due to a new system being installed at the City.
6. As of July 1, 2026, the Costs and Charges payable under Section 5.3 of the Agreement for the 2027 fiscal year are adjusted as follows: Partner's total annual cost for the period starting July 1, 2026 shall not exceed Two

Hundred Forty-Three Thousand, Two Hundred and Twenty-Five Dollars ($243,225), without written amendment hereto, duly executed by both parties. Partner's estimated annual cost is One Hundred Twenty-One Thousand, Six Hundred Thirteen Dollars ($121,613), which includes an estimated fare revenue of Thirty Thousand, Four Hundred Fifty-One Dollars ($30,451).

7. Except to the extent specifically provided above, this Third Amendment shall not be interpreted or construed as waiving any rights, obligations, remedies, or claims the parties may otherwise have under the Agreement.
8. In all other respects and except as modified herein, the terms of the Agreement shall remain in force and effect.

[Signature Page Follows]

The following clauses are for inclusion into procurement documents, but can also be inserted into contractual agreements. However, additional clauses and certification may be required for contractual agreements.

ACCESS TO RECORDS AND REPORTS

1. Record Retention. The Contractor will retain, and will require its subcontractors of all tiers to retain, complete and readily accessible records related in whole or in part to the contract, including, but not limited to, data, documents, reports, statistics, leases, subcontracts, arrangements, other third party Contracts of any type, and supporting materials related to those records.

2. Retention Period. The Contractor agrees to comply with the record retention requirements in accordance with 2 C.F.R. § 200.334. The Contractor shall maintain all books, records, accounts and reports required under this Contract for a period of at not less than three (3) years after the date of termination or expiration of this Contract, except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case records shall be maintained until the disposition of all such litigation, appeals, claims or exceptions related thereto.

3. Access to Records. The Contractor agrees to provide sufficient access to FTA and its contractors to inspect and audit records and information, including such records and information the contractor or its subcontractors may regard as confidential or proprietary, related to performance of this contract in accordance with 2 CFR § 200.337.

4. Access to the Sites of Performance. The Contractor agrees to permit FTA and its contractors access to the sites of performance under this contract in accordance with 2 CFR § 200.337.

CHANGES TO FEDERAL REQUIREMENTS

Federal requirements that apply to the Recipient or the Award, the accompanying Underlying Agreement, and any Amendments thereto may change due to changes in federal law, regulation, other requirements, or guidance, or changes in the Recipient's Underlying Agreement including any information incorporated by reference and made part of that Underlying Agreement; and

Applicable changes to those federal requirements will apply to each Third Party Agreement and parties thereto at any tier.

CIVIL RIGHTS LAWS AND REGULATIONS

The following Federal Civil Rights laws and regulations apply to all contracts.

The Contractor and any subcontractor agree to comply with all the requirements prohibiting discrimination on the basis of race, color, or national origin of the Title VI of the Civil Rights Action of 1964, as amended 52 U.S.C 2000d, and U.S. DOT regulation "Nondiscrimination in Federally-Assisted Programs of the Department of Transportation – Effectuation of the Title VI of the Civil rights Act, "49 C.F. R. Part 21 and any implementing requirement FTA may issue.

1 Federal Equal Employment Opportunity (EEO) Requirements. These include, but are not limited to:

a) Nondiscrimination in Federal Public Transportation Programs. 49 U.S.C. § 5332, covering projects, programs, and activities financed under 49 U.S.C. Chapter 53, prohibits discrimination on the basis of race, color, religion, national origin, sex (including sexual orientation), disability, or age, and prohibits discrimination in employment or business opportunity.

b) Prohibition against Employment Discrimination. Title VII of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000e, Title VI of the Civil Rights Act of 1964," 49 CFR Part 21, and 49 U.S.C. § 5332, prohibits discrimination in employment on the basis of race, color, religion, sex, or national origin.

2 Nondiscrimination on the Basis of Sex. Title IX of the Education Amendments of 1972, as amended, 20 U.S.C. § 1681 et seq. and implementing Federal regulations, "Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance," 49 C.F.R. part 25 prohibit discrimination on the basis of sex.

3 Nondiscrimination on the Basis of Age. The "Age Discrimination Act of 1975," as amended, 42 U.S.C. § 6101 et seq., and Department of Health and Human Services implementing regulations, "Nondiscrimination on the Basis of Age in Programs or Activities Receiving Federal Financial Assistance," 45 C.F.R. part 90, prohibit discrimination by participants in federally assisted programs against individuals on the basis of age. The Age Discrimination in Employment Act (ADEA), 29 U.S.C. § 621 et seq., and Equal Employment Opportunity Commission (EEOC) implementing regulations, "Age Discrimination in Employment Act," 29 C.F.R. part 1625, also prohibit employment discrimination against individuals age 40 and over on the basis of age.

4 Federal Protections for Individuals with Disabilities. The Americans with Disabilities Act of 1990, as amended (ADA), 42 U.S.C. § 12101 et seq., prohibits discrimination against qualified individuals with disabilities in programs, activities, and services, and imposes specific requirements on public and private entities. Third party contractors must comply with their responsibilities under Titles I, II, III, IV, and V of the ADA in employment, public services, public accommodations, telecommunications, and other provisions, many of which are subject to regulations issued by other Federal agencies.

Civil Rights and Equal Opportunity
The Agency is an Equal Opportunity Employer. As such, the Agency agrees to comply with all applicable Federal civil rights laws and implementing regulations. Apart from inconsistent requirements imposed by Federal laws or regulations, the Agency agrees to comply with the requirements of 49 U.S.C. § 5323(h) (3) by not using any Federal assistance awarded by FTA to support procurements using exclusionary or discriminatory specifications. Under this Contract, the Contractor shall at all times comply with the following requirements and shall include these requirements in each subcontract entered into as part thereof.

1. Nondiscrimination. In accordance with Federal transit law at 49 U.S.C. § 5332, the Contractor agrees that it will not discriminate against any employee or applicant for employment because of race, color, religion, national origin, sex, disability, or age. In addition, the Contractor agrees to comply with applicable Federal implementing regulations and other implementing requirements FTA may issue.

2. Equal Employment Opportunity. In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e et seq., Title I of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. §§ 12101, et seq.; and Federal transit laws at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable equal employment opportunity requirements, without regard to their race, color, religion, national origin, or sex (including sexual orientation). In addition, the Contractor agrees to comply with any implementing requirements FTA may issue.

3. Age. In accordance with the Age Discrimination in Employment Act, 29 U.S.C. §§ 621-634, U.S. Equal Employment Opportunity Commission (U.S. EEOC) regulations, "Age Discrimination in Employment Act," 29 C.F.R. part 1625, the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6101 et seq., U.S. Health and Human Services regulations, "Nondiscrimination on the Basis of Age in Programs or Activities Receiving Federal Financial Assistance," 45 C.F.R. part 90, and Federal transit law at 49 U.S.C. § 5332, the Contractor agrees to refrain from discrimination against present and prospective employees for reason of age. In addition, the Contractor agrees to comply with any Implementing requirements FTA may issue.

4.Disabilities. In accordance with section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. § 794, the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. § 12101 et seq., the Architectural Barriers Act of 1968, as amended, 42 U.S.C. § 4151 et seq., and Federal transit law at 49 U.S.C. § 5332, the Contractor agrees that it will not discriminate against individuals on the basis of disability. In addition, the Contractor agrees to comply with any implementing requirements FTA may issue.

5. Federal Law and Public Policy Requirements. The Contractor shall ensure that Federal funding is expended in full accordance with the U.S. Constitution, Federal Law, and statutory and public policy requirements: including, but not limited to, those protecting free speech, religious liberty, public welfare, the environment, and prohibiting discrimination.

DEBARMENT AND SUSPENSION

Debarment and Suspension (Executive Orders 12549 and 12689). A covered transaction (see 2 C.F.R. §§ 180.220 and 1200.220) must not be entered into with any party listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. 180 that implement Executive Orders 12549 (31 U.S.C. § 6101 note, 51 Fed. Reg. 6370,) and 12689 (31 U.S.C. § 6101 note, 54 Fed. Reg. 34131), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. The Recipient agrees to include, and require each Third Party Participant to include, a similar provision in each lower tier covered transaction, ensuring that each lower tier Third Party Participant:

(1) Complies with federal debarment and suspension requirements; and

(2) Reviews the SAM at https://www.sam.gov, if necessary to comply with U.S. DOT regulations, 2 CFR Part 1200.

DISADVANTAGED BUSINESS ENTERPRISE (DBE)

(Does not apply to projects fully funded by the Tribal Transportation Program (TTP).)

It is the policy of the Agency and the United States Department of Transportation ("DOT") that Disadvantaged Business Enterprises ("DBE's"), as defined herein and in the Federal regulations published at 49 C.F.R. part 26, shall have an equal opportunity to participate in DOT-assisted contracts.

The contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49 C.F.R. part 26 in the award and administration of DOT-assisted contracts. Failure by the contractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy as the Agency deems appropriate, which may include, but is not limited to:

(1) Withholding monthly progress payments;

(2) Assessing sanctions;

(3) Liquidated damages; and/or

(4) Disqualifying the contractor from future bidding as non-responsible. 49 C.F.R. § 26.13(b).

Prime contractors are required to pay subcontractors for satisfactory performance of their contracts no later than 30 days from receipt of each payment the Agency makes to the prime contractor. 49 C.F.R. § 26.29(a).

Finally, for contracts with defined DBE contract goals, the contractor shall utilize the specific DBEs listed unless the contractor obtains the Agency's written consent; and that, unless the Agency's consent is provided, the contractor shall not be entitled to any payment for work or material unless it is performed or supplied by the listed DBE. 49 C.F.R. § 26.53(f) (1).

DOMESTIC PREFERENCES FOR PROCUREMENTS

a. The recipient or subrecipient should, to the greatest extent practicable and consistent with law, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards, contracts, and purchase orders under Federal awards.

b. For purposes of this section:

(1) "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

c. Federal agencies providing Federal financial assistance for infrastructure projects must implement the Buy America preferences set forth in 2 CFR 184.

ENERGY CONSERVATION

The contractor agrees to comply with mandatory standards and policies relating to energy efficiency, which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C.§ 6201).

FLY AMERICA

a) Definitions. As used in this clause—
1) "International air transportation" means transportation by air between a place in the United States and a place outside the United States or between two places both of which are outside the United States. 2) "United States" means the 50 States, the District of Columbia, and outlying areas. 3) "U.S.-flag air carrier" means an air carrier holding a certificate under 49 U.S.C. Chapter 411.

b) When Federal funds are used to fund travel, Section 5 of the International Air Transportation Fair Competitive Practices Act of 1974 (49 U.S.C. 40118) (Fly America Act) requires contractors, Agencys, and others use U.S.-flag air carriers for U.S. Government-financed international air transportation of personnel (and their personal effects) or property, to the extent that service by those carriers is available. It requires the Comptroller General of the United States, in the absence of satisfactory proof of the necessity for foreign-flag air transportation, to disallow expenditures from funds, appropriated or otherwise established for the account of the United States, for international air transportation secured aboard a foreign-flag air carrier if a U.S.-flag air carrier is available to provide such services.

c) If available, the Contractor, in performing work under this contract, shall use U.S.-flag carriers for international air transportation of personnel (and their personal effects) or property.

d) In the event that the Contractor selects a carrier other than a U.S.-flag air carrier for international air transportation, the Contractor shall include a statement on vouchers involving such transportation essentially as follows:

Statement of Unavailability of U.S.-Flag Air Carriers
International air transportation of persons (and their personal effects) or property by U.S.-flag air carrier was not available or it was necessary to use foreign-flag air carrier service for the following reasons. See FAR § 47.403. [State reasons]:

e) Contractor shall include the substance of this clause, including this paragraph (e), in each subcontract or purchase under this contract that may involve international air transportation.

INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS

The provisions within include, in part, certain Standard Terms and Conditions required under the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR § 200), whether or not expressly set forth in the preceding contract provisions. All contractual provisions required by DOT, detailed in 2 CFR § 200 or as amended by 2 CFR § 1201, or the most recent version of FTA Circular 4220.1 are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. The Contractor shall not perform any act, fail to perform any act, or refuse to comply with any request which would cause a violation of the FTA terms and conditions.

NO GOVERNMENT OBLIGATION TO THIRD PARTIES

The Recipient and Contractor acknowledge and agree that, notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the underlying Contract, absent the express written consent by the Federal Government, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to the Recipient, Contractor or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying Contract. The Contractor agrees to include the above clause in each subcontract financed in whole or in part with Federal assistance provided by the FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.

NOTICE TO FTA AND U.S. DOT INSPECTOR GENERAL OF INFORMATION RELATED TO FRAUD, WASTE, ABUSE, OR OTHER LEGAL MATTERS

If a current or prospective legal matter that may affect the Federal Government emerges, the Recipient must promptly notify the FTA Chief Counsel and FTA Regional Counsel for the Region in which the Recipient is located. The Recipient must include a similar notification requirement in its Third Party Agreements and must require each Third Party Participant to include an equivalent provision in its subagreements at every tier, for any agreement that is a "covered transaction" according to 2 C.F.R. §§ 180.220 and 1200.220.

(1) The types of legal matters that require notification include, but are not limited to, a major dispute, breach, default, litigation, or naming the Federal Government as a party to litigation or a legal disagreement in any forum for any reason.

(2) Matters that may affect the Federal Government include, but are not limited to, the Federal Government's interests in the Award, the accompanying Underlying Agreement, and any Amendments thereto, or the Federal Government's administration or enforcement of federal laws, regulations, and requirements.

(3) The Recipient must promptly notify the U.S. DOT Inspector General in addition to the FTA Chief Counsel or Regional Counsel for the Region in which the Recipient is located, if the Recipient has knowledge of potential fraud, waste, or abuse occurring on a Project receiving assistance from FTA. The notification provision applies if a person has or may have submitted a false claim under the False Claims Act, 31 U.S.C. § 3729 et seq., or has or may have committed a criminal or civil violation of law pertaining to such matters as fraud, conflict of interest, bribery, gratuity, or similar misconduct. This responsibility occurs whether the Project is subject to this Agreement or another agreement between the Recipient and FTA, or an agreement involving a principal, officer, employee, agent, or Third Party Participant of the Recipient. It also applies to subcontractors at any tier. Knowledge, as used in this paragraph, includes, but is not limited to, knowledge of a criminal or civil investigation by a Federal, state, or local law enforcement or other investigative agency, a criminal indictment or civil complaint, or probable cause that could support a criminal indictment, or any other credible information in the possession of the Recipient.

PATENT RIGHTS AND RIGHTS IN DATA

Intellectual Property Rights
This Project is funded through a Federal award with FTA for experimental, developmental, or research work purposes. As such, certain Patent Rights and Data Rights apply to all subject data first produced in the performance of this Contract. The Contractor shall grant the Agency intellectual property access and licenses deemed necessary for the work performed under this Contract and in accordance with the requirements of 37 C.F.R. part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by FTA or U.S. DOT.

The terms of an intellectual property agreement and software license rights will be finalized prior to execution of this Contract and shall, at a minimum, include the following restrictions:

Except for its own internal use, the Contractor may not publish or reproduce subject data in whole or in part, or in any manner or form, nor may the Contractor authorize others to do so, without the written consent of FTA, until such time as FTA may have either released or approved the release of such data to the public. This restriction on publication, however, does not apply to any contract with an academic institution.

For purposes of this Contract, the term "subject data" means recorded information whether or not copyrighted, and that is delivered or specified to be delivered as required by the Contract. Examples of "subject data" include, but are not limited to computer software, standards, specifications, engineering drawings and associated lists, process sheets, manuals, technical reports, catalog item identifications, and related information, but do not include financial reports, cost analyses, or other similar information used for performance or administration of the Contract.

1. The Federal Government reserves a royalty-free, non-exclusive and irrevocable license to reproduce, publish, or otherwise use, and to authorize other

use for “Federal Government Purposes,” any subject data or copyright described below. For “Federal Government Purposes,” means use only for the direct purposes of the Federal Government. Without the copyright owner’s consent, the Federal Government may not extend its Federal license to any other party.

a. Any subject data developed under the Contract, whether or not a copyright has been obtained; and

b. Any rights of copyright purchased by the Contractor using Federal assistance in whole or in part by the FTA.

2. Unless FTA determines otherwise, the Contractor performing experimental, developmental, or research work required as part of this Contract agrees to permit FTA to make available to the public, either FTA’s license in the copyright to any subject data developed in the course of the Contract, or a copy of the subject data first produced under the Contract for which a copyright has not been obtained. If the experimental, developmental, or research work, which is the subject of this Contract, is not completed for any reason whatsoever, all data developed under the Contract shall become subject data as defined herein and shall be delivered as the Federal Government may direct.

3. Unless prohibited by state law, upon request by the Federal Government, the Contractor agrees to indemnify, save, and hold harmless the Federal Government, its officers, agents, and employees acting within the scope of their official duties against any liability, including costs and expenses, resulting from any willful or intentional violation by the Contractor of proprietary rights, copyrights, or right of privacy, arising out of the publication, translation, reproduction, delivery, use, or disposition of any data furnished under that contract. The Contractor shall not be required to indemnify the Federal Government for any such liability arising out of the wrongful act of any employee, official, or agents of the Federal Government.

4. Nothing contained in this clause on rights in data shall imply a license to the Federal Government under any patent or be construed as affecting the scope of any license or other right otherwise granted to the Federal Government under any patent.

5. Data developed by the Contractor and financed entirely without using Federal assistance provided by the Federal Government that has been incorporated into work required by the underlying Contract is exempt from the requirements herein, provided that the Contractor identifies those data in writing at the time of delivery of the Contract work.

6. The Contractor agrees to include these requirements in each subcontract for experimental, developmental, or research work financed in whole or in part with Federal assistance.

PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS AND RELATED ACTS

The Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. § 3801 et seq. and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 C.F.R. part 31, apply to its actions pertaining to this Project. Upon execution of the underlying contract, the Contractor certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to the underlying contract or the FTA assisted project for which this contract work is being performed. In addition to other penalties that may be applicable, the Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on the Contractor to the extent the Federal Government deems appropriate.

The Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. chapter 53, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5323(l) on the Contractor, to the extent the Federal Government deems appropriate.

The Contractor agrees to include the above two clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.

PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.

a) Recipients and subrecipients are prohibited from obligating or expending loan or grant funds to:

1) Procure or obtain covered telecommunications equipment or services;
2) Extend or renew a contract to procure or obtain covered telecommunications equipment or services; or
3) Enter into a contract (or extend or renew a contract) to procure or obtain covered telecommunications equipment or services.

(b) As described in section 889 of Public Law 115-232, "covered telecommunications equipment or services" means any of the following:

(1) Telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities);

(2) For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities);

(3) Telecommunications or video surveillance services provided by such entities or using such equipment;

(4) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country;

(c) For the purposes of this section, "covered telecommunications equipment or services" also include systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

(d) In implementing the prohibition under section 889 of Public Law 115-232, heads of executive agencies administering loan, grant, or subsidy programs must prioritize available funding and technical support to assist affected businesses, institutions and organizations as is reasonably necessary for those affected entities to transition from covered telecommunications equipment or services, to procure replacement equipment or services, and to ensure that communications service to users and customers is sustained.

(e) When the recipient or subrecipient accepts a loan or grant, it is certifying that it will comply with the prohibition on covered telecommunications equipment and services in this section. The recipient or subrecipient is not required to certify that funds will not be expended on covered telecommunications equipment or services beyond the certification provided upon accepting the loan or grant and those provided upon submitting payment requests and financial reports.

(f) For additional information, see section 889 of Public Law 115-232 and 200.471.

PROMPT PAYMENT

(Does not apply to projects fully funded by the Tribal Transportation Program (TTP).)

The contractor is required to pay its subcontractors performing work related to this contract for satisfactory performance of that work no later than 30 days after the contractor's receipt of payment for that work. In addition, the contractor is required to return any retainage payments to those subcontractors within 30 days after the subcontractor's work related to this contract is satisfactorily completed.

The contractor must promptly notify the Agency, whenever a DBE subcontractor performing work related to this contract is terminated or fails to complete its work and must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. The contractor may not terminate any DBE subcontractor and perform that work through its own forces or those of an affiliate without prior written consent of the Agency.

RESTRICTIONS ON LOBBYING

Conditions on use of funds.

(a) No appropriated funds may be expended by the recipient of a Federal contract, grant, loan, or cooperative agreement to pay any person 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 any of the following covered Federal actions: the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(b) Each person who requests or receives from an agency a Federal contract, grant, loan, or cooperative agreement shall file with that agency a certification, that the person has not made, and will not make, any payment prohibited by paragraph (a) of this section.

(c) Each person who requests or receives from an agency a Federal contract, grant, loan, or a cooperative agreement shall file with that agency a disclosure form if such person has made or has agreed to make any payment using nonappropriated funds (to include profits from any covered Federal action), which would be prohibited under paragraph (a) of this section if paid for with appropriated funds.

(d) Each person who requests or receives from an agency a commitment providing for the United States to insure or guarantee a loan shall file with that agency a statement, whether that person has made or has agreed to make any payment to influence or attempt 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 that loan insurance or guarantee.

(e) Each person who requests or receives from an agency a commitment providing for the United States to insure or guarantee a loan shall file with that agency a disclosure form if that person has made or has agreed to make any payment to influence or attempt 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 that loan insurance or guarantee.

Certification and disclosure.

(a) Each person shall file a certification, and a disclosure form, if required, with each submission that initiates agency consideration of such person for:

(1) Award of a Federal contract, grant, or cooperative agreement exceeding $100,000; or

(2) An award of a Federal loan or a commitment providing for the United States to insure or guarantee a loan exceeding $150,000.

(b) Each person shall file a certification, and a disclosure form, if required, upon receipt by such person of:

(1) A Federal contract, grant, or cooperative agreement exceeding $100,000; or

(2) A Federal loan or a commitment providing for the United States to insure or guarantee a loan exceeding $150,000,

Unless such person previously filed a certification, and a disclosure form, if required, under paragraph (a) of this section.

(c) Each person shall file a disclosure form at the end of each calendar quarter in which there occurs any event that requires disclosure or that materially affects the accuracy of the information contained in any disclosure form previously filed by such person under paragraphs (a) or (b) of this section. An event that materially affects the accuracy of the information reported includes:

(1) A cumulative increase of $25,000 or more in the amount paid or expected to be paid for influencing or attempting to influence a covered Federal action; or

(2) A change in the person(s) or individual(s) influencing or attempting to influence a covered Federal action; or,

(3) A change in the officer(s), employee(s), or Member(s) contacted to influence or attempt to influence a covered Federal action.

(d) Any person who requests or receives from a person referred to in paragraphs (a) or (b) of this section:

(1) A subcontract exceeding $100,000 at any tier under a Federal contract;

(2) A subgrant, contract, or subcontract exceeding $100,000 at any tier under a Federal grant;

(3) A contract or subcontract exceeding $100,000 at any tier under a Federal loan exceeding $150,000; or,

(4) A contract or subcontract exceeding $100,000 at any tier under a Federal cooperative agreement,

Shall file a certification, and a disclosure form, if required, to the next tier above.

(e) All disclosure forms, but not certifications, shall be forwarded from tier to tier until received by the person referred to in paragraphs (a) or (b) of this section. That person shall forward all disclosure forms to the agency.

(f) Any certification or disclosure form filed under paragraph (e) of this section shall be treated as a material representation of fact upon which all receiving tiers shall rely. All liability arising from an erroneous representation shall be borne solely by the tier filing that representation and shall not be shared by any tier to which the erroneous representation is forwarded. Submitting an erroneous certification or disclosure constitutes a failure to file the required certification or disclosure, respectively. If a person fails to file a required certification or disclosure, the United States may pursue all available remedies, including those authorized by section 1352, title 31, U.S. Code.

(g) For awards and commitments in process prior to December 23, 1989, but not made before that date, certifications shall be required at award or commitment, covering activities occurring between December 23, 1989, and the date of award or commitment. However, for awards and commitments in process prior to the December 23, 1989 effective date of these provisions, but not made before December 23, 1989, disclosure forms shall not be required at time of award or commitment but shall be filed within 30 days.

(h) No reporting is required for an activity paid for with appropriated funds if that activity is allowable under either subpart B or C.

SAFE OPERATION OF MOTOR VEHICLES

Seat Belt Use
The Contractor is encouraged to adopt and promote on-the-job seat belt use policies and programs for its employees and other personnel that operate company-owned vehicles, company rented vehicles, or personally operated vehicles. The terms “company-owned” and “company-leased” refer to vehicles owned or leased either by the Contractor or Agency.

Distracted Driving
The Contractor agrees to adopt and enforce workplace safety policies to decrease crashes caused by distracted drivers, including policies to ban text messaging while using an electronic device supplied by an employer, and driving a vehicle the driver owns or rents, a vehicle Contactor owns, leases, or rents, or a privately-owned vehicle when on official business in connection with the work performed under this Contract.

SOLID WASTES (RECOVERED MATERIALS)

(a) A Recipient or subrecipient that is a State agency or agency of a political subdivision of a State and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act of 1976 as amended, 42 U.S.C. 6962. The requirements of Section 6002 include procuring only items designated in the guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

(b) The recipient or subrecipient should, to the greatest extent practicable and consistent with law, purchase, acquire, or use products and services that can be reused, refurbished, or recycled; contain recycled content, are biobased, or are energy and water efficient; and are sustainable. This may include purchasing compostable items and other products and services that reduce the use of single-use plastic products. See Executive Order 14057, section 101, Policy.

SPECIAL NOTIFICATION REQUIREMENTS FOR STATES

Applies to States –

a. To the extent required under federal law, the State, as the Recipient, agrees to provide the following information about federal assistance awarded for its State Program, Project, or related activities:

(1) The Identification of FTA as the federal agency providing the federal assistance for a State Program or Project;
(2) The Catalog of Federal Domestic Assistance Number of the program from which the federal assistance for a State Program or Project is authorized; and
(3) The amount of federal assistance FTA has provided for a State Program or Project.

b. Documents - The State agrees to provide the information required under this provision in the following documents:

(1) applications for federal assistance,
(2) requests for proposals or solicitations,
(3) forms,
(4) notifications,
(5) press releases,
(6) other publications.

TERMINATION

Termination for Convenience (General Provision)
The Agency may terminate this contract, in whole or in part, at any time by written notice to the Contractor when it is in the Agency's best interest. The Contractor shall be paid its costs, including contract close-out costs, and profit on work performed up to the time of termination. The Contractor shall promptly submit its termination claim to Agency to be paid the Contractor. If the Contractor has any property in its possession belonging to Agency, the Contractor will account for the same, and dispose of it in the manner Agency directs.

Termination for Default [Breach or Cause] (General Provision)
If the Contractor does not deliver supplies in accordance with the contract delivery schedule, or if the contract is for services, the Contractor fails to perform in the manner called for in the contract, or if the Contractor fails to comply with any other provisions of the contract, the Agency may terminate this contract for default. Termination shall be effected by serving a Notice of Termination on the Contractor setting forth the manner in which the Contractor is in default. The Contractor will be paid only the contract price for supplies delivered and accepted, or services performed in accordance with the manner of performance set forth in the contract. If it is later determined by the Agency that the Contractor had an excusable reason for not performing, such as a strike, fire, or flood, events which are not the fault of or are beyond the control of the Contractor, the Agency, after setting up a new delivery of performance schedule, may allow the Contractor to continue work, or treat the termination as a Termination for Convenience.

Opportunity to Cure (General Provision)
The Agency, in its sole discretion may, in the case of a termination for breach or default, allow the Contractor [an appropriately short period of time] in which to cure the defect. In such case, the Notice of Termination will state the time period in which cure is permitted and other appropriate conditions

If Contractor fails to remedy to Agency's satisfaction the breach or default of any of the terms, covenants, or conditions of this Contract within [10 days] after receipt by Contractor of written notice from Agency setting forth the nature of said breach or default, Agency shall have the right to terminate the contract without any further obligation to Contractor. Any such termination for default shall not in any way operate to preclude Agency from also pursuing all available remedies against Contractor and its sureties for said breach or default.

Waiver of Remedies for any Breach
In the event that Agency elects to waive its remedies for any breach by Contractor of any covenant, term or condition of this contract, such waiver by Agency shall not limit Agency's remedies for any succeeding breach of that or of any other covenant, term, or condition of this contract.

Termination for Convenience (Professional or Transit Service Contracts)
The Agency, by written notice, may terminate this contract, in whole or in part, when it is in the Agency's interest. If this contract is terminated, the Agency shall be liable only for payment under the payment provisions of this contract for services rendered before the effective date of termination.

Termination for Default (Supplies and Service)
If the Contractor fails to deliver supplies or to perform the services within the time specified in this contract or any extension, or if the Contractor fails to comply with any other provisions of this contract, the Agency may terminate this contract for default. The Agency shall terminate by delivering to the Contractor a Notice of Termination specifying the nature of the default. The Contractor will only be paid the contract price for supplies delivered and accepted, or services performed in accordance with the manner or performance set forth in this contract. If, after termination for failure to fulfill contract obligations, it is determined that the Contractor was not in default, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of the Agency.

Termination for Default (Transportation Services)
If the Contractor fails to pick up the commodities or to perform the services, including delivery services, within the time specified in this contract or any extension, or if the Contractor fails to comply with any other provisions of this contract, the Agency may terminate this contract for default. The Agency shall terminate by delivering to the Contractor a Notice of Termination specifying the nature of default. The Contractor will only be paid the contract price for services performed in accordance with the manner of performance set forth in this contract.

If this contract is terminated while the Contractor has possession of Agency goods, the Contractor shall, upon direction of the Agency, protect and preserve the goods until surrendered to the Agency or its agent. The Contractor and Agency shall agree on payment for the preservation and protection of goods. Failure to agree on an amount will be resolved under the Dispute clause.

If, after termination for failure to fulfill contract obligations, it is determined that the Contractor was not in default, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of the Agency.

Termination for Default (Construction)
If the Contractor refuses or fails to prosecute the work or any separable part, with the diligence that will ensure its completion within the time specified in this contract or any extension or fails to complete the work within this time, or if the Contractor fails to comply with any other provision of this contract, Agency may terminate this contract for default. The Agency shall terminate by delivering to the Contractor a Notice of Termination specifying the nature of the def

In this event, the Agency may take over the work and compete it by contract or otherwise, and may take possession of and use any materials, appliances, and plant on the work site necessary for completing the work. The Contractor and its sureties shall be liable for any damage to the Agency resulting from the Contractor's refusal or failure to complete the work within specified time, whether or not the Contractor's right to proceed with the work is terminated. This liability includes any increased costs incurred by the Agency in completing the work.

The Contractor's right to proceed shall not be terminated nor shall the Contractor be charged with damages under this clause if: 1. The delay in completing the work arises from unforeseeable causes beyond the control and without the fault or negligence of the Contractor. Examples of such causes include: acts of God, acts of Agency, acts of another contractor in the performance of a contract with Agency, epidemics, quarantine restrictions, strikes, freight embargoes; and 2. The Contractor, within [10] days from the beginning of any delay, notifies Agency in writing of the causes of delay. If, in the judgment of Agency, the delay is excusable, the time for completing the work shall be extended. The judgment of Agency shall be final and conclusive for the parties, but subject to appeal under the Disputes clause(s) of this contract. 3. If, after termination of the Contractor's right to proceed, it is determined that the Contractor was not in default, or that the delay was excusable, the rights and obligations of the parties will be the same as if the termination had been issued for the convenience of Agency.

Termination for Convenience or Default (Architect and Engineering)
The Agency may terminate this contract in whole or in part, for the Agency's convenience or because of the failure of the Contractor to fulfill the contract obligations. The Agency shall terminate by delivering to the Contractor a Notice of Termination specifying the nature, extent, and effective date of the termination. Upon receipt of the notice, the Contractor shall (1) immediately discontinue all services affected (unless the notice directs otherwise), and (2) deliver to the Agency 's Contracting Officer all data, drawings, specifications, reports, estimates, summaries, and other information and materials accumulated in performing this contract, whether completed or in process. Agency has a royalty-free, nonexclusive, and irrevocable license to reproduce, publish or otherwise use, all such data, drawings, specifications, reports, estimates, summaries, and other information and materials.

If the termination is for the convenience of the Agency, the Agency's Contracting Officer shall make an equitable adjustment in the contract price but shall allow no anticipated profit on unperformed services.

If the termination is for failure of the Contractor to fulfill the contract obligations, the Agency may complete the work by contact or otherwise and the Contractor shall be liable for any additional cost incurred by the Agency.

If, after termination for failure to fulfill contract obligations, it is determined that the Contractor was not in default, the rights and obligations of the parties shall be the same as if the termination had been issued for the convenience of Agency

Termination for Convenience or Default (Cost-Type Contracts)
The Agency may terminate this contract, or any portion of it, by serving a Notice of Termination on the Contractor. The notice shall state whether the termination is for convenience of Agency or for the default of the Contractor. If the termination is for default, the notice shall state the manner in which the Contractor has failed to perform the requirements of the contract. The Contractor shall account for any property in its possession paid for from funds received from the Agency, or property supplied to the Contractor by the Agency. If the termination is for default, the Agency may fix the fee, if the contract provides for a fee, to be paid the Contractor in proportion to the value, if any, of work performed up to the time of termination. The Contractor shall promptly submit its termination claim to the Agency and the parties shall negotiate the termination settlement to be paid the Contractor.

If the termination is for the convenience of Agency, the Contractor shall be paid its contract close-out costs, and a fee, if the contract provided for payment of a fee, in proportion to the work performed up to the time of termination.

If, after serving a Notice of Termination for Default, the Agency determines that the Contractor has an excusable reason for not performing, the Agency, after setting up a new work schedule, may allow the Contractor to continue work, or treat the termination as a Termination for Convenience.

OTHER RECOMMENDED CONTRACT REQUIREMENTS

CONFORMANCE WITH ITS NATIONAL ARCHITECTURE

Intelligent Transportation Systems (ITS) projects shall conform to the National ITS Architecture and standards pursuant to 23 CFR § 940. Conformance with the National ITS Architecture is interpreted to mean the use of the National ITS Architecture to develop a regional ITS architecture in support of integration and the subsequent adherence of all ITS projects to that regional ITS architecture. Development of the regional ITS architecture should be consistent with the transportation planning process for Statewide and Metropolitan Transportation Planning (49 CFR Part 613 and 621).

FEDERAL TAX LIABILITY AND RECENT FELONY CONVICTIONS

(1) The contractor certifies that it:

(a) Does not have any unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or have lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability; and

(b) Was not convicted of the felony criminal violation under any Federal law within the preceding 24 months.

If the contractor cannot so certify, the Recipient will refer the matter to FTA and not enter into any Third Party Agreement with the Third Party Participant without FTA's written approval.

(2) Flow-Down. The Recipient agrees to require the contractor to flow this requirement down to participants at all lower tiers, without regard to the value of any subagreement.

SEVERABILITY

The Contractor agrees that if any provision of this agreement or any amendment thereto is determined to be invalid, then the remaining provisions thereof that conform to federal laws, regulations, requirements, and guidance will continue in effect.

TRAFFICKING IN PERSONS

The contractor agrees that it and its employees that participate in the Recipient's Award, may not:

(a) Engage in severe forms of trafficking in persons during the period of time that the Recipient's Award is in effect;

(b) Procure a commercial sex act during the period of time that the Recipient's Award is in effect; or

(c) Use forced labor in the performance of the Recipient's Award or subagreements thereunder.

GOVERNMENT-WIDE DEBARMENT AND SUSPENSION (NONPROCUREMENT)

Recipients, contractors, and subcontractors that enter into covered transactions are required to verify that the entity (as well as its principals and affiliates) with which they propose to contract or subcontract is not excluded or disqualified. This is done by: (a) checking the SAM exclusions; (b) collecting a certification from that person (found below); or (c) adding a clause or condition to the contract or subcontract.

Instructions for Certification: Signing below indicates the prospective lower tier participant is providing the signed certification.

(1) It will comply and facilitate compliance with U.S. DOT regulations, "Nonprocurement Suspension and Debarment," 2 CFR part 1200, which adopts and supplements the U.S. Office of Management and Budget (U.S. OMB) "Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement)," 2 CFR part 180,

(2) To the best of its knowledge and belief, that its Principals and Subrecipients at the first tier:

a. Are eligible to participate in covered transactions of any Federal department or agency and are not presently:

1. Debarred,
2. Suspension,
3. Proposed for debarment,
4. Declared ineligible,
5. Voluntarily excluded, or
6. Disqualified

b. Its management has not within a three-year period preceding its latest application or proposal been convicted of or had a civil judgment rendered against any of them for:

1. 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,
2. Violation of any Federal or State antitrust statute, or,
3. Commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making any false statement, or receiving stolen property,

c. It is not presently indicted for, or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses listed in the preceding subsection 2.b of this Certification,

d. It has not had one or more public transactions (Federal, State, or local) terminated for cause or default within a three-year period preceding this Certification,

e. If, at a later time, it receives any information that contradicts the statements of subsections 2.a – 2.d above, it will promptly provide that information to FTA,

f. It will treat each lower tier contract or lower tier subcontract under its Project as a covered lower tier contract for purposes of 2 CFR part 1200 and 2 CFR part 180 if it:

1. Equals or exceeds $25,000,
2. Is for audit services, or,
3. Requires the consent of a Federal official, and

g. It will require that each covered lower tier contractor and subcontractor:

1. Comply and facilitate compliance with the Federal requirements of 2 CFR parts 180 and 1200, and
2. Assure that each lower tier participant in its Project is not presently declared by any Federal department or agency to be:
   a. Debarred from participation in its federally funded Project,
   b. Suspended from participation in its federally funded Project,
   c. Proposed for debarment from participation in its federally funded Project,
   d. Declared ineligible to participate in its federally funded Project,
   e. Voluntarily excluded from participation in its federally funded Project, or
   f. Disqualified from participation in its federally funded Project, and

(3) It will provide a written explanation as indicated on a page attached in FTA's TrAMS platform or the Signature Page if it or any of its principals, including any of its first tier Subrecipients or its Third-Party Participants at a lower tier, is unable to certify compliance with the preceding statements in this Certification Group.

Certification

Contractor:_____

Signature of Authorized Official:_____ Date_____/_____/_____

Name and Title of Contractor's Authorized Official:_____

CERTIFICATION AND RESTRICTIONS ON LOBBYING

I,_____hereby certify
(Name and title of official)

On behalf of _____that:
(Name of Bidder/Company Name)

- 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 an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

- If any funds other than federal appropriated funds have been paid or will be paid to any person influencing or attempting to influence an officer or employee of any agency, a Member of Congress, and officer or employee of Congress, or an employee of a Member of Congress in connection with the federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

- The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including sub-contracts, sub-grants and contracts under grants, loans, and cooperative agreements) and that all sub-recipients 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 $10,000 and not more than $100,000 for each such failure.,

Name of Bidder/Company Name:_____

Type or print name:_____

Signature of authorized representative:_____ Date_____/_____/_____

Contractor Compliance and Oversight

Federal Compliance

The Contractor shall comply with all applicable federal, state, and local laws, regulations, and requirements associated with services funded in whole or in part through the Federal Transit Administration (FTA) Section 5307 Urbanized Area Formula Program, including but not limited to:

- FTA Master Agreement
- FTA Circular 9030.1
- 2 CFR Part 200 (Uniform Guidance)
- 49 CFR Parts 27, 37, and 38 (Americans with Disabilities Act)
- Title VI of the Civil Rights Act of 1964
- 49 CFR Part 655 (Drug and Alcohol Testing)
- 49 CFR Part 673 (Public Transportation Agency Safety Plans), when applicable
- 49 CFR Part 609 (Half-Fare Requirements), when applicable
- 2 CFR Part 180 (Suspension and Debarment)

The Contractor shall maintain compliance throughout the term of this Agreement.

Annual Compliance Documentation

The Contractor shall provide the following documentation to the Agency annually, or upon request:

ADA Compliance

- Current ADA policy
- ADA complaint procedure
- ADA complaint log and disposition for the prior year
- Certification that accessible vehicles are used to provide contracted services

Title VI Compliance

- Current Title VI complaint procedure
- Title VI complaint log and disposition for the prior year
- Copy of public notice of Title VI rights
- Certification that Title VI notices are posted in vehicles and on the Contractor's website
- Advance notification of proposed service or fare changes affecting Agency residents

Additionally, every three (3) years, or upon update, the Contractor shall provide:

- Current Title VI Program

- FTA or State approval letter, if applicable

Drug and Alcohol Compliance

For safety-sensitive services:

- Certification that the Contractor maintains an FTA-compliant Drug and Alcohol Testing Program
- Most recent Drug and Alcohol MIS submission confirmation
- Designated Employer Representative (DER) contact information

Equal Employment Opportunity

If applicable under FTA requirements:

- Certification of compliance with EEO requirements
- Most recent EEO approval letter

Safety Plan Compliance

Where applicable:

- Documentation demonstrating compliance with Public Transportation Agency Safety Plan requirements
- Identification of the designated Safety Officer
- Documentation of annual safety plan review and approval

National Transit Database / DAMIS Reporting

- Confirmation of most recent reporting submission
- Verification that contracted service data is accurately reported

Half-Fare Compliance

For fixed-route services:

- Current fare policy
- Reduced-fare eligibility criteria
- Certification of compliance with federal half-fare requirements

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Access to Records and Monitoring

The Contractor shall permit the Agency, FTA, U.S. Department of Transportation, Comptroller General of the United States, North Carolina Department of Transportation, and their authorized

representatives access to all books, records, reports, policies, procedures, facilities, vehicles, and personnel necessary to monitor compliance with this Agreement.

The Agency may conduct annual compliance reviews, monitoring visits, virtual meetings, or documentation reviews to verify compliance with federal requirements and contractual obligations.

Performance Monitoring

The Contractor shall cooperate with Agency performance monitoring activities and shall provide operational information upon request, including:

- Ridership statistics
- On-time performance data
- Service reliability metrics
- Customer complaints and resolutions
- Service modifications
- Safety incidents affecting contracted services

Suspension and Debarment

The Contractor certifies that neither it nor its principals are presently suspended, debarred, proposed for debarment, declared ineligible, or voluntarily excluded from participation in federally funded transactions.

The Contractor shall immediately notify the Agency if its suspension or debarment status changes during the term of this Agreement.

Corrective Actions

If the Agency identifies a compliance deficiency, the Agency shall provide written notice to the Contractor describing the deficiency.

The Contractor shall submit a corrective action plan within the timeframe established by the Agency and shall implement all agreed-upon corrective actions.

Failure to correct deficiencies may result in:

- Withholding of reimbursement requests;
- Suspension of payments associated with federally funded services;

- Additional monitoring requirements; or
- Termination of this Agreement in accordance with applicable termination provisions.

FTA Triennial Review Requirement (CATS)

Because services under this Agreement are supported with Federal Transit Administration Section 5307 funding, the Contractor shall provide the Agency with:

- The most recent FTA Triennial Review report upon request;
- Copies of any findings, deficiencies, or corrective actions related to areas affecting the services provided under this Agreement;
- Copies of corrective action plans submitted to FTA;
- Documentation of corrective action completion; and
- The FTA Triennial Review closeout letter.

The Contractor shall notify the Agency within thirty (30) calendar days of receiving any new Triennial Review findings or corrective action requirements during the term of this Agreement.

This version aligns directly with your Contract Oversight Procedures and gives Union County Transportation the contractual authority to obtain documentation needed for an FTA Triennial Review or State Management Review.

Record Retention

The Contractor shall retain all records related to this Agreement for a minimum of three (3) years following final payment or final expenditure of federal funds, whichever is later, and longer if required by federal or state law, audit findings, litigation, or unresolved claims.

- **IN WITNESS WHEREOF,** and in acknowledgement that the parties hereto have read and understood each and every provision hereof, the parties have caused this Third Amendment to be executed as of the date first written above.

COUNTY OF UNION	**CITY OF CHARLOTTE**
BY: _____	**BY: _____**
(signature)	***(signature)***
PRINT NAME: _____	**PRINT NAME: _____**
TITLE: _____	**TITLE: _____**
DATE: _____	**DATE: _____**

Union County, NC

Staff Report

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

File #: 26-423 **Agenda Date:** 7/20/2026

TITLE:

Budget Amendment - Funding to Build and Support Enhanced Community-Based Health Care Delivery to Improve the Health and Quality of Life for All North Carolinians

INFORMATION CONTACT:

Traci Colley, Human Services Agency - Department of Public Health, Director, 704-296-4801

ACTION REQUESTED:

1) Recognize, receive, and appropriate $21,143.16 in Bringing Value Home Innovation Funding from Community Care of North Carolina, Inc. and 2) approve Budget Amendment #1.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Community Care of North Carolina, Inc. (CCNC) has awarded Union County Public Health, a one-time Bringing Value Home Innovation Funding grant in the amount of $21,143.16.

The purpose of this grant is to assist practices in identifying and executing plans that support CCNC's charitable mission to build and support enhanced community-based health care delivery systems to improve the health and quality of life for all North Carolinians. To remain consistent with this mission and CCNC's tax-exempt status, acceptable uses for these funds include but are not limited to:

- Activities that support expanding access to care such as open access scheduling
- Implementing practice-based solutions to reduce unnecessary Emergency Department and Inpatient Utilization and improve timely follow-up with patients after hospital utilization occurs
- Improving quality performance, particularly for targeted Medicaid PHP Quality Measures
- Employing new ways to engage unengaged patients
- Implementing Practice Innovations that align with CCNC's mission
- Grant funds may not be used for lobbying or partisan political activities.

FINANCIAL IMPACT:

The County is awarded $21,143.16 from Community Care of North Carolina, Inc. No County match is requested or required.

From: Randy Barrington <rbarrington@communitycarenc.org>
Sent: Tuesday, 09 June 2026 11:56:51
To: Traci Colley <traci.colley@unioncountync.gov>
Subject: Bringing Value Home Innovation Funding

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.
Sent on behalf of Dr. Tom Wroth, President and CEO of Community Care of North Carolina:

June 9, 2026

Dear **Union County Health Department:**

I am pleased to inform you that Community Care of North Carolina, Inc. (CCNC) has awarded your practice *Bringing Value Home* Innovation Funding, a one-time grant in the amount of **$21,143.16**. The payment represents $14.47 PM (per member) calculated using your **March 2026 Medicaid Standard Plan Prepaid Health Plan (PHP) attribution of 1,461 as reported to CCNC in the Beneficiary files from each PHP. As attribution rates vary from month to month, the Innovation Funding grants were calculated using March 2026 attribution data – for consistency and accuracy.** If your practice is a multi-site organization, please note that individual payments will be made at the location level.

This notification letter is being sent to you as the Primary Business Contact for your practice and **we encourage you to share it with others in your organization who may need official notification of the grant.**

The purpose of this grant is to assist practices in identifying and executing plans that support CCNC's charitable mission to build and support enhanced community-based health care delivery systems to improve the health and quality of life for all North Carolinians. To remain consistent with this mission and CCNC's tax-exempt status, acceptable uses for these funds include but are not limited to:

- Activities that support expanding access to care such as open access scheduling
- Implementing practice-based solutions to reduce unnecessary Emergency Department and Inpatient Utilization and improve timely follow-up with patients after hospital utilization occurs
- Improving quality performance, particularly for targeted Medicaid PHP Quality Measures
- Employing new ways to engage unengaged patients
- Implementing Practice Innovations that align with CCNC's mission

Grant funds may not be used for lobbying or partisan political activities.

This grant period will be one (1) year, and the award will be made in a single payment (per location, if applicable) by Electronic Funds Transfer, labeled "Innovation Funding 2026" on or before June 30, 2026. Your acceptance of these funds constitutes your agreement to use the funds for purposes such as those described above. Should we require additional information to process the payment, we will reach out to you prior to payment.

Later this summer, your Provider Relations Representative (PRR) will meet with you to discuss how you plan to utilize your practice's *Bringing Value Home* Innovation funding. All grant funds should be used in accordance with the acceptable uses described above by June 30, 2027.

Thank you for all you continue to do for your patients and your community.



Tom Wroth, MD, MPH
President and CEO
Community Care of North Carolina, Inc.

Who is CCNC? Watch these short videos to find out.
CCPN: Providing Value to Independent Primary Care – See How
Accountability • Collaboration • Excellence • Innovation • Health Equity and Access

The content of this message and any attachments are intended solely for the use of the individual or entity to whom it is addressed and may contain proprietary or confidential information.
If you have received this e-mail by mistake, you are not authorized to copy, forward, or in any way use or rely upon its contents. Please inform us by reply email and then delete the message and attachments from your system. Thank you for your understanding.

Bringing Value Home **Innovation Funding** ***June 30, 2026***	**$**	**21,143.16**
Reimplementation of Child Health Behavioral Health Program FY27		
Orientation training for Behavioral Health Care Manager (BHCM)		$379.00
Conference/ongoing training for BHCM and pediatrician		$2,000.00
Pediatric psychiatrist consultant 2H/week @ $150.00 per hour for up to 26 weeks		$8,000.00
AIMS Caseload Tracker, 3 years		$2,600.00
Interpreting costs, in-person and virtual		$3,550.00
Child Health Capacity Expansion		
CH Expanded Role Rostered Nurse Training		$2,500.00
Travel associated with training		$1,500.00
Susitinence associated with training		$612.00
Total:		**$21,141.00**

BUDGET AMENDMENT

BUDGET	Public Health	REQUESTED BY	Traci Colley
FISCAL YEAR	FY 2027	DATE	July 20, 2026

INCREASE

Description	
DEPT SRV CHRGS-3RD PARTY	21,143
Reimplementation of CHBH FY27	16,531
Child Health Capacity Expansion	4,612

DECREASE

Description	

Explanation: To allocate a one-time grant in the amount of $21,143.16 to the Bringing Value Home Innovation Funding from (CCNC) Community Care of North Carolina, Inc. (CCNC)The payment represents $14.47 PM (per member) calculated using your March 2026 Medicaid Standard Plan Prepaid HealthPlan (PHP) attribution of 1,461 as reported to CCNC in the Beneficiary files from each PHP.

DATE 7/20/2026

APPROVED BY

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

FOR POSTING PURPOSES ONLY

DEBIT

Code	Account	Amount
10130510-5313-11429	Education	2,381
10130510-5381-11429	Profressional Services	8,000
10130510-5354-11429	Maint Agreements-Computer	2,600
10130510-5381-11429	Profressional Services	3,550
10130510-5313-11483	Education	2,500
10130510-5311-11483	Travel	1,500
10130510-5312-11483	Travel Subsistence	612
	Total	21,143

CREDIT

Code	Account	
10130510-4520-11483	DEPT SRV CHRGS-3RD PARTY	16,531
10130510-4520-11429	DEPT SRV CHRGS-3RD PARTY	4,612
	Total	21,143

Prepared By MEG
Posted By
Date

Number 1

File #: 26-404 **Agenda Date:** 7/20/2026

TITLE:

Petition for Annexation and Rezoning

INFORMATION CONTACT:

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

ACTION REQUESTED:

Authorize the County Manager to 1) sign the petition of annexation into the Town of Wingate and 2) sign and submit the application for rezoning.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County purchased approximately 38.35 acres of land in Wingate for the purposes of economic development. Parcels 09012003C, 09-012-010B, and 09-012-010D are located in the Town of Wingate's extraterritorial jurisdiction (ETJ) and are currently zoned RA-20. To support economic growth, create jobs, and attract new taxable investment, which is the highest and best use of this property, we are seeking to annex and rezone these parcels to a Conditional Light Industrial designation.

FINANCIAL IMPACT:

None.

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

File #: 26-406 **Agenda Date:** 7/20/2026

TITLE:

Purchase - Library Digital Materials

INFORMATION CONTACT:

Nina Chaffin, Library, Director, 704-283-3561

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:

At the beginning of each fiscal year, the Library issues a purchase order to one of its primary material vendors, Overdrive, Inc. The Library then orders materials against this purchase order throughout the year. We have a contract (#4089) with Overdrive, Inc. for the digital platform, and all materials for this platform must come from Overdrive. The approval of this PO will enable the Library to commence its E-books, E-audiobooks, and E-magazine purchasing for the year so that there is no significant lapse in new materials for the public, as well as the digital platform fee.

The Library has utilized the contractual services of Overdrive, Inc. for library materials since July, 2015. The vendor has been effective and efficient in meeting our service needs, and we are requesting to continue this service for an additional twelve months.

FINANCIAL IMPACT:

The anticipated cost for the materials is $174,000 and is budgeted accordingly for FY 2027.

Outlook

Fw: Materials POs for FY27

From Matthew Killough <Matthew.Killough@unioncountync.gov>
Date Wed 6/24/2026 8:32 AM
To Matthew Killough <Matthew.Killough@unioncountync.gov>

From: Nina Chaffin <Nina.Chaffin@unioncountync.gov>
Sent: Friday, June 19, 2026 11:02 AM
To: Tracy Tripodi <Tracy.Tripodi@unioncountync.gov>; Matthew Killough <Matthew.Killough@unioncountync.gov>
Cc: Rachel Webb <Rachel.Webb@unioncountync.gov>; Lindsey Shuford <Lindsey.Shuford@unioncountync.gov>
Subject: Materials POs for FY27

Here are the PO amounts we need entered for the new FY that must go before the BOCC. Can you please enter these in today, so we can meet the BOCC agenda deadline of 6/29?

1. **Ingram TOTAL: $309,500**
   $275,000 for books out of 5233
   $34,500 supplies out of 5260

2. **OverDrive TOTAL: $174,000**
   $118,000 for eBooks and eAudiobooks out of 5232
   $56,000 for eMagazines, eSubscriptions, and Platform Fee out of 5234

Nina Chaffin
Director | Union County Library

T 704-283-3561
uclnc.org

UNION COUNTY LIBRARY

Union County Library
316 East Windsor Street
Monroe, NC 28112

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UNION COUNTY LIBRARY

Memorandum

To: Brian Matthews, County Manager

From: Nina Chaffin

cc: Patrick Niland, Deputy County Manager
Beverly Liles, Finance Director
Corey Brooks, Division Director, Procurement

Date: July 8, 2026

Re: Exemption of RFP Process – Overdrive

Pursuant to Union County Procurement Policy, Section 3.5, Procurement of Other Services, item # 3.5.2 and proposed supporting County Manager procedure,

"Because there are no statutory requirements applicable to the procurement of such services, the County Manager may exempt a service from the RFP process for good cause and when in the best interest of Union County. The exemption of any such service exceeding $90,000 shall be reported to the Board of Commissioners at the next regular meeting and shall include the justification for exemption."

We have a contract with Overdrive for their platform. Overdrive provides digital materials for their platform that is used by the Library to provide eBooks, eAudiobooks, and other digital or streaming materials for patron use. It is important that we maintain these services in order to provide uninterrupted services to our patrons.

It is my determination that utilizing Overdrive would be in the best interest of Union County and the Library. I respectfully request exemption of the RFP process to receive support services from Overdrive for $174,000.

Brian W Matthews

Brian Matthews
County Manager

7/9/26

Date

Union County Main Library
316 East Windsor St.
Monroe, NC 28112
T 704.283.8184
unioncountync.gov/library

explore. create. learn.

File #: 26-427 **Agenda Date:** 7/20/2026

TITLE:

Purchase - Library Print Materials

INFORMATION CONTACT:

Nina Chaffin, Library, Director, 704-283-3561

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:

At the beginning of each fiscal year, the Library issues a purchase order to its primary materials vendor, Ingram Library Services. The Library then orders materials against this purchase order throughout the year. The Library's discounts have been negotiated by Mid Atlantic Library Alliance, Inc. (MALiA), a library consortium of which Union County is a member. The approval of this purchase will enable the Library to commence its book purchasing for the year so that there is no significant lapse in new materials for the public.

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 materials will be made using MALiA contract LVA-MAT-22-007, quoted by Ingram Library Services.

F-INANCIAL IMPACT:

The anticipated cost for the materials is $309,500 and is budgeted accordingly for FY 2027.

Outlook

Fw: Materials POs for FY27

From Matthew Killough <Matthew.Killough@unioncountync.gov>
Date Wed 6/24/2026 8:32 AM
To Matthew Killough <Matthew.Killough@unioncountync.gov>

From: Nina Chaffin <Nina.Chaffin@unioncountync.gov>
Sent: Friday, June 19, 2026 11:02 AM
To: Tracy Tripodi <Tracy.Tripodi@unioncountync.gov>; Matthew Killough <Matthew.Killough@unioncountync.gov>
Cc: Rachel Webb <Rachel.Webb@unioncountync.gov>; Lindsey Shuford <Lindsey.Shuford@unioncountync.gov>
Subject: Materials POs for FY27

Here are the PO amounts we need entered for the new FY that must go before the BOCC. Can you please enter these in today, so we can meet the BOCC agenda deadline of 6/29?

1. **Ingram TOTAL: $309,500**
   $275,000 for books out of 5233
   $34,500 supplies out of 5260

2. **OverDrive TOTAL: $174,000**
   $118,000 for eBooks and eAudiobooks out of 5232
   $56,000 for eMagazines, eSubscriptions, and Platform Fee out of 5234

Nina Chaffin
Director | Union County Library

T 704-283-3561
uclnc.org

UNION COUNTY LIBRARY

Union County Library
316 East Windsor Street
Monroe, NC 28112

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LIBRARY OF VIRGINIA

Dennis T. Clark
Librarian of Virginia

LIBRARY OF VIRGINIA, ON BEHALF OF MID-ATLANTIC LIBRARY ALLIANCE, INC. (MALiA) RENEWAL/CONTRACT MODIFICATION

Date: May 26, 2026

Contract: LVA-MAT-22-007

Renewal Number: 1

Modification Number: 1

Issued by: Library of Virginia, on behalf of
Mid-Atlantic Library Alliance, Inc. (MALiA)
800 East Broad Street
Richmond, VA 23219

Contractor: Ingram Library Services, LLC
One Ingram Blvd.
LaVergne, TN 37086

Description of Modification: Pricing increase for the following:

Discount changes:
For customers with Sales up to $149,999
Adult and Juvenile Trade Hardcover ……..…….44.0%

Low Price Point – this discount will be included:
* Trade Hardcover, Quality Paperbacks and Mass Market Paperback titles ordered with a cover price of $14.99 or less will receive a 20% discount.

Cataloging and Processing:
To simplify budgeting and to speed items through our facilities, Ingram offers bundled cataloging and processing services. With our tiered service levels, your library can easily estimate its yearly cataloging and processing costs and identify ways to save. Rather than charging for each item applied to a unit, all units on a designated account will be charged the same cataloging and processing fee. This speeds up the work in our processing units and lets the library reconcile charges with little effort. It also distributes cataloging costs across all Ingram's cataloging customers more fairly and enables us to maintain lower fees. Going forward, all existing customers will be moved to bundle billing.

Description	**New Price/Unit**
Mylar jacket Component (Applied or Loose)	$1.40
Bundle only available Kapco Cover & Mylar *(Laminate, only 5 mil offered)*	$1.90
MARC Record Bundle only via iPage/FTP	$0.75
NEW - Marc and Mylar bundle	$2.15
NEW - Mylar & Laminate & Marc bundle	$2.65
NEW - iClassic B (no Laminate)	$1.99

800 East Broad Street
Richmond, Virginia 23219

www.lva.virginia.gov

804.692.3500 *phone*
804.692.3976 *tty*

- Replaces the “Automated package” to include:
  - Mylar, ILS supplied Barcodes, Spine Labels, Label protectors, property stamps, Best Available Marc Record.
- NEW - iClassic A (with Laminate) $2.54
  - Replaces the “Automated package” to include:
  - Mylar, ILS supplied Barcodes, Spine Labels, Label protectors, property stamps, Best Available Marc Record.

- The following items will be sunset as Ingram Library Services will no longer offer:

Theft Detection	$0.69 per unit
Date Due Slip (Partial)	$0.20 per unit
Pocket (Paper)	$0.35 per unit
Property Stamping	$0.25 / impression

All Cataloging and processing options are based on each library’s specifications and their specific needs.



Freight Terms:
Public Libraries - For libraries with a minimum of $150,000 in annual expenditures with Ingram or a commitment to meet this annual expenditure level, orders will ship with Ingram-paid freight from your primary and secondary distribution centers.

For libraries with less than $150,000 in annual expenditures, Orders of 10 or more units from both your primary and secondary distribution center will ship with Ingram Paid Freight. Shipments of fewer than 10 units will be charged a flat $6.00 shipping fee. This flat fee amount or qualifying unit quantity is subject to change with notice. Items picked, packed, and shipped together count as an individual shipment. Due to the impact of rising oil prices, Ingram has instituted a $3.00 fuel surcharge. This fee is subject to change with bilateral agreement via contract modification

All other pricing remains the same.

This renewal Agreement is entered into pursuant to the basic Contract with the following changes:

PERIOD OF AGREEMENT: From July 1, 2026 through June 30, 2027with no renewals remaining.

STATUS OF PERSONNEL: Ryan Alexander has been designated as the Contract Administrator.

Except for the changes provided herein, all other terms and conditions of the basic Contract remain unchanged and in full force and effect.

Contractor

Carolyn Mower 5/27/2026
Signature and Date

Library of Virginia

Dan K Hinderliter
Signature and Date

_Carolyn Morris, Vice President _____
Name and Title (Printed)

Daniel K Hinderliter, C.O.O.
Name and Title (Printed)

Union County, NC

Staff Report

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

File #: 26-407 **Agenda Date:** 7/20/2026

TITLE:

Purchase - Dump Truck

INFORMATION CONTACT:

Caleb Sinclair, Solid Waste, Director, 704-283-3576

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None

BACKGROUND:

This piece of equipment is necessary to fulfill our regulatory environmental compliance obligations with respect to NCDEQ Solid Waste Permit for cover material at the Union County Construction and Demolition Landfill facility.

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 2027 Peterbilt 567 Quad Dump Truck will be made using Sourcewell Contract #060920-PMC quoted by The Larson Group Peterbilt.

FINANCIAL IMPACT:

The anticipated cost for the 2027 Peterbilt 567 Quad Dump Truck is $272,391.40 and is budgeted accordingly for FY27.

Contract#: 032824-PMC

KEEPING CUSTOMERS FOR LIFE

Thursday, June 25, 2026

Kevin Holland
TLG Peterbilt - Charlotte
3917 Trailer Dr.
Charlotte, NC 282269

Union County Solid Waste and Recycling
2125 Austin Chaney Rd.
Wingate, NC 28174
828-287-6127

Regarding: 2027 Peterbilt 567 Quad Axle Dump quotation per Sourcewell Contract #060920-PMC

Mr. Chris Mediln:

The Larson Group Peterbilt is a proud vendor for Sourcewell, and we are pleased to submit for your review our quotation for a new 2027 Peterbilt 567 Quad Dump per Sourcewell Contract #060920-PMC. Your terms are as follows:

2027 Peterbilt (567) per the attached specifications
Price includes Sourcewell discount from Peterbilt Motors Company
Price includes pre-delivery inspection
Price does NOT include state or federal taxes, such as Federal Excise Tax
Price is FOB our dealership location in Charlotte, NC
Delivery in approximately 12 days after issue of PO to TLG Peterbilt Charlotte.

This truck is stock on the ground at our Charlotte TLG Peterbilt store

Net cash price, FOB Peterbilt of Charlotte: $224,652.00

Based on a list price of $340,382.00, this represents a discount of 34% in agreement with the Soucewell contract #060920-PMC pricing for this model.
Discount: ($115,730.00)

Sourced Goods:
Requested additional add on options: **RS/Godwin 21'(Dump body)** for an additional ($47,000.00) (Body quote supplied by RS/Godwin). Chassis Flooring Expense 150 Days for Body install ($4560)

$46,649.00

Additional Dealer add items:
Fuel, DEF, Detail, DOT, Nut Covers & Caps, for a total of

$1090.40

Total $272,391.40

Customer signature: _____

Please call or email me if you have any questions.

We look forward to doing business with you and your agency.

Sincerely,

Kevin Holland

Kevin Holland
Municipal & Refuse Sales
Office 704-599-2311
Cell 980-522-2177
Fax 704-597-8764
kholland@tlgtrucks.com



DEALER BULLETIN

SUBJECT: Sourcewell Customer Pricing CY2026-2028

DB # 26-07
DATE: 3-9-26

Peterbilt is excited to announce the Sourcewell Customer Pricing program for 2026-2028. Sourcewell holds national contracts that offer an easy, time-saving procurement process for all levels of government and education. The discount by model represents the "% Off List" price the customer will pay when ordering units on the Sourcewell program.

Sourcewell Customer Pricing CY-2026-2028
Peterbilt Motors Company Contract #032824-PMC

Model	Avg List Price	"CY2026-2028 Sourcewell Discount"	Estimated Sourcewell Customer Price
220*	$ 119,935	5%	$ 113,938
535	$ 122,843	15%	$ 104,417
536	$ 146,150	15%	$ 124,228
537	$ 155,048	15%	$ 131,791
548	$ 191,209	17%	$ 158,703
567	$ 311,611	34%	$ 205,663
579	$ 294,766	30%	$ 206,336
589	$ 323,492	30%	$ 226,444
520	$ 313,513	28%	$ 225,729

File #: 26-418 **Agenda Date:** 7/20/2026

TITLE:

Union County Land Preservation and Easement Program

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 90-2026-006, and 90-2026-007 in the amount of $545,785; and 2) accept Easements 90-2026-006, and 90-2026-007 into the Union County Land Preservation & Easement Program.

PRIOR BOARD ACTIONS:

None.

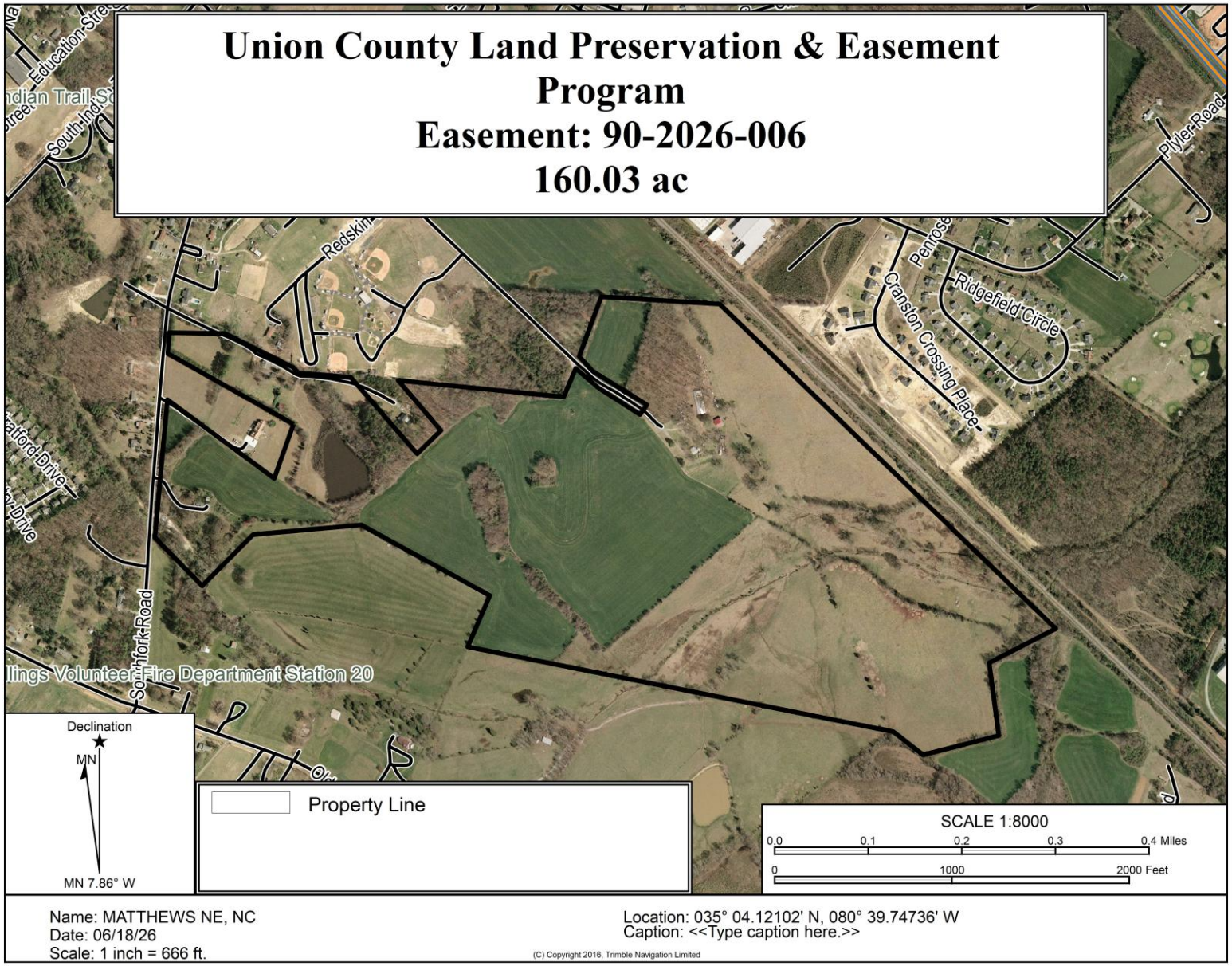
BACKGROUND:

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.

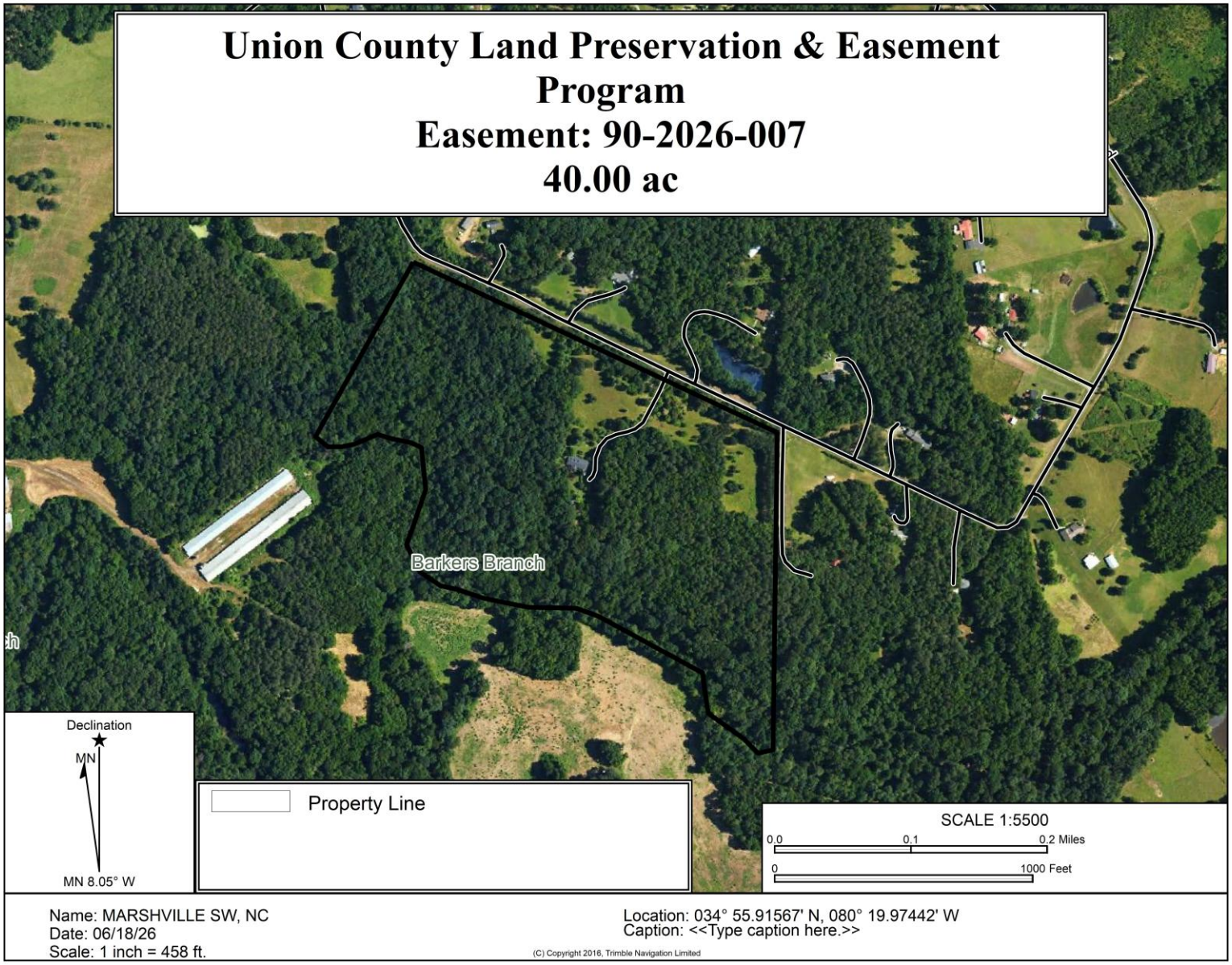
The Union County Land Preservation & Easement program allows landowners to sell and/or donate the development rights to their property while still obtaining ownership of the land. By selling and/or donating the development rights, open space and agricultural land will be preserved through conservation 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:

$545,745 for the purchase of Easements 90-2026-006, and 90-2026-007.



	Def Value	Purchase %	Acres	Purchase Cost
$	4,814,600.00	10%	162.03	$ 481,460.00



Def Value	Purchase %	Acres	Purchase Cost
$ 257,300.00	25%	40.00	$ 64,325.00

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

File #: 26-438 **Agenda Date:** 7/20/2026

TITLE:

Grant Application - National 4-H Council Lead to Change Project

INFORMATION CONTACT:

Andrew Baucom, Agricultural Services, Director, 704-283-3738

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:

Lead to Change is a community action planning platform and grant funding opportunity that supports individual teens, groups or clubs in bringing their ideas for change to life. Projects span topic areas from agriculture, civic engagement, healthy living, STEM, to leadership, sharing a common goal: empowering youth to identify community needs and lead positive change. The program fosters confidence, collaboration, and problem-solving skills in the next generation of Beyond Ready Leaders.

FINANCIAL IMPACT:

$2,000 grant funding to support Union County 4-H club programming.

File #: 26-348 **Agenda Date:** 7/20/2026

TITLE:

Contract Renewal - Microsoft Enterprise Agreement

INFORMATION CONTACT:

Jon Amelio, Information Technology, Director, 704-283-3533

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This is the County's Enterprise Agreement Renewal for Microsoft. This contract covers all aspects of our Microsoft Cloud and on-premises environment, from user subscriptions to back-end server maintenance and SQL Server clustering.

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 Microsoft Software Enterprise Agreement will be made using North Carolina Statewide Term Contract #208C - Microsoft Enterprise Agreement Software, quoted by SHI Software International Corp.

FINANCIAL IMPACT:

The anticipated annual cost for this service is $822,138.75. Since this contract contains three-year term, a total of $2,466,416.25 is estimated to be spent. Funding is available in the adopted FY27 budget appropriation with future expenditures subject to annual BOCC budget appropriation.

Pricing Proposal
Quotation #: 27667243
Created On: 6/22/2026
Valid Until: 6/30/2026

NC-County of Union

Luke Fawcett
Monroe
United States
Phone: 704.296.4237
Email: luke.fawcett@unioncountync.gov

Microsoft Inside Account Manager Public Sector

Erika Rogers
290 Davidson Avenue
Somerset, NJ 08873
Phone: 7328686183
Email: MSSouthAtlanticGov@shi.com

All Prices are in US Dollar (USD)

	Product	Qty	Retail	Your Price	Total
1	SQL Server Enterprise Core ALng SA 2L Microsoft - Part#: 7JQ-00343 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	18	$2,968.00	$2,430.79	$43,754.22
2	SQL Server Standard Core ALng SA 2L Microsoft - Part#: 7NQ-00292 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	28	$774.00	$633.91	$17,749.48
3	Win Remote Desktop Services CAL ALng SA UCAL Microsoft - Part#: 6VC-01254 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	370	$32.00	$26.21	$9,697.70
4	Win Server DC Core ALng SA 2L Microsoft - Part#: 9EA-00278 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	144	$167.00	$136.77	$19,694.88
5	Win Server Standard Core ALng SA 2L Microsoft - Part#: 9EM-00270 Contract Name: Microsoft Software - Enterprise Agreement	8	$26.00	$21.29	$170.32

	Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule				
6	M365 G3 Unified FSA Renewal GCC Sub Per User Microsoft - Part#: AAD-34700 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	1320	$404.40	$331.20	$437,184.00
7	M365 G3 Unified FUSL GCC Sub Per User Microsoft - Part#: AAD-34704 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	433	$475.20	$389.19	$168,519.27
8	Copilot Studio Legacy USL GCC Sub Per User Microsoft - Part#: 8S2-00003 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	6	$0.00	$0.00	$0.00
9	Visio P2 GCC Sub Per User Microsoft - Part#: P3U-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	16	$169.20	$138.57	$2,217.12
10	Copilot Studio GCC Sub (Messages) Microsoft - Part#: YGD-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	1	$3,000.00	$2,457.00	$2,457.00
11	M365 F3 Unified GCC Sub Per User Microsoft - Part#: AAD-63092 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	150	$103.20	$84.47	$12,670.50
12	Planner & Project P3 GCC Sub Per User Microsoft - Part#: 7MS-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	10	$337.20	$276.17	$2,761.70

13	Power Apps Premium GCC Sub Per User Microsoft - Part#: SEL-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	30	$264.00	$216.22	$6,486.60
14	Power Automate Premium GCC Sub Per User Microsoft - Part#: 1O5-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	17	$198.00	$162.16	$2,756.72
15	Power Automate Process GCC Sub Microsoft - Part#: 8F6-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	5	$1,980.00	$1,621.62	$8,108.10
16	Power BI Premium P1 GCC Sub Microsoft - Part#: HKL-00002 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	1	$56,044.80	$45,900.69	$45,900.69
17	Power BI Pro GCC Sub Per User Microsoft - Part#: DDJ-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	415	$123.60	$101.23	$42,010.45
18	Teams AC with Dial Out US/CA GCC Sub Add-on Microsoft - Part#: NYH-00001 Contract Name: Microsoft Software - Enterprise Agreement Contract #: 208C Coverage Term: 8/1/2026 - 7/31/2027 **Note:** EA 90300982 - Renewal; See Payment Schedule	1903	$0.00	$0.00	$0.00
				Total	$822,138.75

Additional Comments

Payment Schedule:
Year 1 (8/1/2026 - 7/31/2027): $822,138.75
Year 2 (8/1/2027 - 7/31/2028): $822,138.75
Year 3 (8/1/2028 - 7/31/2029): $822,138.75
Total: $2,466,416.25

Due to the potential impact of any current or future tariffs, the price and availability of hardware items on this quote may be subject to change.

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date listed above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order. For any additional information including Hardware, Software and Services Contracts, please contact an SHI Inside Sales Representative at (888) 744-4084. SHI International Corp. is 100% Minority Owned, Woman Owned Business. TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0

The products offered under this proposal are resold in accordance with the terms and conditions of the Contract referenced under that applicable line item.

File #: 26-442 **Agenda Date:** 7/20/2026

TITLE:

Purchase - Laptop and Desktop Computers

INFORMATION CONTACT:

Jon Amelio, Information Technology, Director, 704-283-3533

ACTION REQUESTED:

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

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County IT is requesting approval to purchase 415 laptop/desktop units across county departments. This will serve to replace existing equipment that is at, or beyond, its useful lifecycle based on the County's five-year technology replacement plan. The deployment plan is as follows: County-Wide: 265 units - Social Services: 150 units.

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 equipment will be made using North Carolina Statewide Term Contract #204A - Microcomputers, Peripherals, and Related Services, quoted by Davenport Group.

FINANCIAL IMPACT:

The anticipated cost for the computer equipment is $475,000 and is budgeted accordingly for FY27.

STATE OF NORTH CAROLINA
DEPARTMENT OF INFORMATION TECHNOLOGY (DIT)
STATEWIDE IT PROCUREMENT OFFICE

Statewide IT Contract Number	**204A - Microcomputers, Peripherals, and Related Services**
Bid / Solicitation Number	ITS-400203
Contract Award Type	MANDATORY
Current Effective Dates	August 1, 2017 through September 30, 2026 **One (1) one-year renewal option**
Contract Administrator	Beverly Satterfield Email: beverly.satterfield@nc.gov Tel: 919-754-6614

This contract can now be accessed via NC E-Procurement @ Your Service. If you are a user of this system, click https://buyer.ncgov.com/Ariba

SCOPE

1. The Department of Information Technology created this statewide term contract to provide a list of qualified Vendors for Agencies across the State to purchase microcomputers, associated peripherals, and value-added services, with options to purchase additional maintenance and support. This contract is limited to microcomputers that operate Microsoft Windows, Chrome, and Android operating systems. Vendors shall only offer Agencies items listed in Table 1 under this contract. NCDIT Contract Administrator may remove a Vendor from this contract, if this Vendor offers Agencies, under this contract, items that are not listed in Table 1.

2. The 204A Statewide Term Contract is limited to items listed in Table 1:

Microcomputer Segment	Segment Description
Desktop Units	Traditional Personal Computers, Fixed Workstations, “All-in-Ones”, and Thin Clients with a conventional chassis, tower, mini-tower, or small form factor case
Portable Units	Laptops, Notebooks, Chromebooks, Ultra-Portable, Mobile Workstations, and other easily transportable devices with fixed displays and keyboards
2-in-1 Units	Device that can function in a traditional ‘clam-shell’ laptop configuration or as a light weight, touch screen tablet through a conversion using an integrated or detachable keyboard and mouse/trackpad
Tablet Units	Extremely portable solid state computing devices primarily characterized by a single touch screen input mechanism; may or may not include an attachable keyboard

Microcomputer Segment	Segment Description
Peripheral Components	Peripherals must be able to attach to, work with, and be supported by, the Desktop Units, the Portable Units, the 2-in-1 Units, the Tablet Units, and the architecture described elsewhere herein. Peripherals must be present with the general offerings of the manufacturer, and as such, normally available from the manufacturer represented. Peripherals considered within the scope of this contract are monitors, input devices (keyboards, mice), docking stations, memory, hard drives, laptop cases, etc. Peripheral Options (procured by themselves) may be purchased under this contract in amounts up to **$25,000**. It is not mandatory to use this contract for peripheral only purchases.
Value-Added Services	Mandatory Value-Added Services related to Microcomputers that Vendor shall provide are Basic Imaging, Asset Tagging, and Basic Installation. Vendor may provide additional Value Added Services as options, which may include but are not limited to, managed logistics / staggered delivery, bulk packaging, move / add / change services, data migration services, end user training, and end of life disposal / recycling services. For optional Value Added Services, Vendor and Agency shall develop a mutually agreed upon written Statement of Work subject to the terms and conditions of this contract to describe in detail that Value Added Services being provided by the Vendor to the Agency and the specific pricing for these Value Added Services.

Table 1: Scope of 204A Statewide Term Contract for microcomputers, associated peripherals, and value added services

3. This contract **does not include** the following products:

- Mobile Ruggedized Computers (see IT Statewide Term Contract 204B)
- Server Units – Rack-mounted, blades and tower models (see IT Statewide Term Contract 204X)
- Itanium, SPARC, or Power Series (aka UNIX) Workstations/Servers and Peripheral Components (see IT Statewide Term Contract 204X)
- Smartphones, handhelds, and other portable client devices that require cellular broadband services to provide intended functionality
- Printers and Printer Peripheral Components (see IT Statewide Term Contract 204D)
- Digital Cameras
- Hubs, Routers and Switches
- Uninterruptible Power Systems (UPS) and Surge Protectors
- Projectors
- Software (other than OEM version of operating system and system drivers and tools)

This contract is a **MANDATORY** Statewide Term Contract, with approved exceptions, for the use of **Executive Branch State Agencies**. For non-Executive Branch State Agencies this is a Convenience Contract, available, but not mandatory to those entities permitted by law to use this contract. Such entities presently include the North Carolina University System and its member campuses, instructional components of the Department of Public Instruction, instructional components of the North Carolina Community College System, and local (municipal and county) governments.

Agencies with the need to acquire services related not covered by this contract are required to follow the State of North Carolina IT procurement rules, consistent with 09 N.C.A.C. 06 A& B and established procedures of the Department of Information Technology (DIT).

There is no minimum order size or spending limit on this contract.

VOLUME PURCHASING INITIATIVE

The State's Volume Purchasing Initiative for microcomputers and related peripherals is provided under this Statewide Term Contract. Please visit DIT's Bulk Purchasing page for more information about this cost-saving program.

ABNORMAL QUANTITY

Any request that exceeds **$75,000** must be reviewed and approved by the Statewide IT Procurement Office before a Purchase Order can be issued.

For NC eProcurement Users, the system will automatically add the appropriate NCDIT Approvers and the Statewide IT Procurement Office to your Approval Flow.

For Non-NC eProcurement Users, you must email your request (including the Vendor quote and your documentation) to the following address:

> To: Submit2.StatewideIT@its.nc.gov
> (Please include "Abnormal Quantity Request STC 204A" in the subject line of the email).

The Statewide IT Procurement Office, in consultation with the procuring Agency, may process the request in one or more of the following ways:

1. Purchase may be authorized at current pricing with current Vendor(s)
2. Additional discounts from current pricing level may be negotiated with current vendor(s) or approved resellers
3. A separate Invitation for Bids may be issued for the requirement
4. The request may be included in the next scheduled Volume Purchasing Initiative

VENDOR CONTACT INFORMATION

Table 2 contains the awarded Vendors' Ordering Address and Contact information. Orders shall be issued directly to the respective Vendor. To address service or pricing questions, please contact the Vendors listed below.

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
CDW-G **(FOR ACER PRODUCTS)**	Direct	230 N. Milwaukee Ave. Vernon Hills, IL 60061 Phone: 800-808-4239 Fax: 847-465-6800	**Inside Sales for State and Local Governments** Joseph R. Barese III Email: josebar@cdw.com Phone: 866-819-6497 Michael Karpman – **State and Local Sales Manager** Email: michkar@cdw.com Phone: 877.898.8153 **Outside Sales for State and Local Governments** Leslie Smith Email: leslie.smith@cdwg.com Phone: 919-667-4821 **Academic Sales (K-12 Local Education Authorities)** Ashley Pratt Email: ashlpra@cdw.com Phone: 866-819-6496 **Academic Sales (Higher Education)** Greg Henderson Email: greghen@cdw.com Phone: 540-494-2151
Dell	Direct	One Dell Way RR8-MS-8741 Round Rock, TX 78682 Phone: 800-981-3355 Fax: 512-283-8421	**Inside Sales – State and Local Governments** David Cramb Email: david.cramb@dell.com Phone: 512-720-4428 **Outside Sales – State Governments** Manny Veloza Email: manny.veloza@dell.com Phone: 919-272-5214 **Outside Sales – Local Governments** Vincent Occhipinti Email: vincent.occhipinti@Dell.com Phone: 919-601-7482 **Academic Sales – K-12** Tricia Gray Email: tricia.gray@dell.com Phone: 301-256-6246 **Academic Sales – Higher Education** Anthony Jenkins Email: anthony.jenkins@dell.com Phone: 919-264-9235 **Customer Service / Technical / Warranty Support** Website: www.dell.com Email: https://www.dell.com/support/home/en-us Phone: 800-766-3355 Fax: 512-283-0526

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
Dell	SHI International Corp. **(HUB VENDOR)**	290 Davidson Avenue Somerset, NJ 08873 Phone: 888-764-8888	**Sales – State and Local Government, Education** SHI Carolina Team - QUOTING Email: carolinateam@shi.com Phone: 800-211-0831 **Outside Sales – State Agencies** Todd Enter Email: Todd_Enter@shi.com Phone: 336-254-3197 Carly Higginbotham Email: Carly_Higginbotham@shi.com Phone: 919-219-7355 **Outside Sales – Local Government (Raleigh Area)** Jackson Ling Email: Jackson_Ling@shi.com Phone: 910-705-7183 **Outside Sales – Local Government (Charlotte Area)** Justin Hansen Email: Justin_hansen@shi.com Phone: 704-300-9126 **Sales – Education** David Burak Email: david_burak@shi.com Phone: 704-400-3023 Corey Boyd Email: Corey_Boyd@SHI.com Phone: 678-571-9796
	Tiber Creek Consulting **(HUB VENDOR)**	10130 Mallard Creek Road Suite 300 Charlotte, NC 28262 Phone: 704-996-3718 Fax: 704-944-3101	**Inside Sales for State and Local Governments** Keith Bond Keith.bond@tibercreek.com Phone: 704-441-5405 **Outside Sales for State and Local Governments** David Lloyd David.lloyd@tibercreek.com Phone: 704-996-3718 **Academic Sales (K-12 Local Education Authorities)** Donald Junker don.junker@tibercreek.com Phone: 704-685-2479 **Academic Sales (Higher Education)** Jennifer Hillesland Jennifer.hillesland@tibercreek.com Phone: 704-614-0742
	Davenport Group	104 Belfast Avenue Lewisburg, TN 37091 Phone: 877-231-9114	**Sales for State & Local Govt. and Education** Brandon Cole bcole@davenportgroup.com Phone: 704-458-2277

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
Dell	United Data Technologies, INC.	2900 Monarch Lakes Boulevard, Suite 300 Miramar, FL 33027 Phone: 954-308-5100 Fax: 954-432-5203	**Inside Sales for State and Local Governments** Randy Silcox Phone: 800-882-9919 615-481-1810 Email: rsilcox@udtonline.com **Outside Sales for State and Local Governments and Academic Sales (Higher Education)** Sam Lucchese Phone: 919-610-5328 800-882-9919 Email: slucchese@udtonline.com **Academic Sales (K-12 Local Education Authorities)** Sam Lucchese Phone: 800-882-9919 919-610-5328 Email: slucchese@udtonline.com **Inside Sales for K-12** Sam Lucchese Phone: 800-882-9919 919-610-5328 Email: slucchese@udtonline.com
	Sidepath, Inc.	22892 Mill Creek Laguna Hills, CA 92653 Phone: 949-748-8700 Fax: 949-748-8706	**Inside Sales for State and Local Governments** Kristen Norem Phone: 949-403-8074 Email: kristen@sidepath.com **Outside Sales for State and Local Governments and Academic Sales (Higher Education)** Krunal Patel Phone: 949-396-3743 Email: krunal@sidepath.com **Academic Sales (K-12 Local Education Authorities)** Krunal Patel Phone: 949-396-3743 Email: krunal@sidepath.com **Inside Sales for K-12** Krunal Patel Phone: 949-396-3743 Email: krunal@sidepath.com

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
HP	Direct	3800 Quick Hall Road Bldg. 2, Suite 100 Austin, TX 78728 Fax: 800-825-2329 Email: directsledeast@hp.com	**Outside Sales for State & Local Government, K-12, & Higher Education** Mason Dorsett mason.dorsett@hp.com Phone: 919-255-8622 **Order Status Questions** Mark White j.mar.white@hp.com **Customer Service / Technical / Warranty Support** Website Address: www.support.hp.com Phone: 800-334-5144
	Applied Data Technologies **(HUB VENDOR)**	8515 Crown Crescent Ct. Charlotte, NC 28227 Phone: 800-267-1419 Fax: 704-847-3077	**Inside Sales for State and Local Government** Jennifer Clabeaux Jennifer.Clabeaux@applieddatatech.com Phone:704-847-3000 Fax: 704-847-3077 **Outside Sales for State and Local Government** Terri Barnes Terri.Barnes@Applieddatatech.com Phone: 704-847-3000 Fax: 704-847-3077 **Academic Sales (K-12) Local Education Authority)** Lisa Windle LisaWindle@applieddatatech.com Phone: 704-847-3000 Fax: 707-847-3077 **Academic Sales (Higher Education**) Terri Barnes TerriBarnes@applieddatatech.com Phone: 704-847-3000 Fax- 704-847-3077

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
HP	CDWG	230 N. Milwaukee Ave. Vernon Hills, IL 60061 Phone: 800-808-4239 Fax: 847-465-6800	**Inside Sales for State and Local Governments** Joseph R. Barese III Email: josebar@cdw.com Phone: 866-819-6497 Michael Karpman – **State and Local Sales Manager** Email: michkar@cdw.com Phone: 877.898.8153 **Outside Sales for State and Local Governments** Leslie Smith Email: leslie.smith@cdwg.com Phone: 919-667-4821 **Academic Sales (K-12 Local Education Authorities)** Ashley Pratt Email: ashlpra@cdw.com Phone: 866-819-6496 **Academic Sales (Higher Education)** Greg Henderson Email: greghen@cdw.com Phone: 540-494-2151
	Netcom Business Solutions, Inc.	2900 Village Drive Fayetteville, NC 28304 Phone: 888-638-8880 Fax: 910-486-4937	**Sales for State and Local Government, Education** Todd Jordan Email: TJordan@netcombsi.com Phone: 910-486-5040 Fax: 910-486-4937 Jonathan Moseley Email: jonathan@netcombsi.com Phone: 910-486-5040
	Trafera LLC	2550 University Ave. W. Ste 315-S St. Paul, MN 55114 Fax: 651-888-7922	**Sales – State and Local Government, Education** Ryan Lapadat Email: Ryan.Lapadat@trafera.com Phone: 651-888-7922

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
	Vivacity Tech Pbc	641 Fairview Ave N Ste 150 St Paul, MN, 55104	**Sales – State and Local Government, Higher Education** Bo Patterson Email: Bpatterson@vivacitytech.com Phone: 877-731-2069 **Academic Sales (K-12)** Ryan Heineman Email: Ryan@vivacitytech.com Phone: 877-731-2069 Megan Lokuta Email: Megan@vivacitytech.com Phone: 877-731-2069 Chelsi Rhodes Email: Crhodes@vivacitytech.com Phone: 877-731-2069
Lenovo	Direct	8001 Development Drive Morrisville, NC 27560 Phone: 855-253-6686 Fax: 855-515-1782 **Contract Manager**: Kenneth Stephens kstephens@lenovo.com	**Inside Sales for State and Local Governments** Tanika Melvin tmelvin@lenovo.com Phone: 919-874-2931 **Outside Sales for State and Local Governments** Ryan Rand rrand@lenovo.com Phone: 919-986-9349 **Academic Sales (K-12)** Ryan Hansen rhansen@lenovo.com Phone: 704-773-9212 **Academic Sales (Higher Education)** Lora Eckler leckler@lenovo.com Phone: 301-919-5018 **Customer Service / Technical / Warranty Support** Website Address: http://support.lenovo.com/en_US/ Email Address: Please use the “Contact Us” link on the Support Webpage Phone: 800-426-7378

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
Lenovo	Lockstep Technology Group, LLC	190 Technology Pkwy NW Suite 125 Phone: 678-444-4590	**Inside Sales for State and Local Governments & Academic Sales** John Ulmer John.ulmer@lockstepgroup.com Phone: 864-609-3073 **Outside Sales for State and Local Governments & Academic Sales** Chris Turpin Chris.turpin@lockstepgroup.com Phone: 704-770-1659 **Local Representative for Academic Sales (K-12 Local Education Authorities)** Kelley Turpin Kelley.turpin@lockstepgroup.com 704-517-3002 **Local Representative for Academic Sales (Higher Education)** Michael Davis Michael.davis@lockstepgroup.com 404-259-5641
	CDWG	230 N. Milwaukee Ave. Vernon Hills, IL 60061 Phone: 800-808-4239 Fax: 847-465-6800	**Inside Sales for State and Local Governments** Joseph R. Barese III Email: josebar@cdw.com Phone: 866-819-6497 Michael Karpman – **State and Local Sales Manager** Email: michkar@cdw.com Phone: 877.898.8153 **Outside Sales for State and Local Governments** Leslie Smith Email: leslie.smith@cdwg.com Phone: 919-667-4821 **Academic Sales (K-12 Local Education Authorities)** Ashley Pratt Email: ashlpra@cdw.com Phone: 866-819-6496 **Academic Sales (Higher Education)** Greg Henderson Email: greghen@cdw.com Phone: 540-494-2151

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
	GovConnection, Inc. dba Connection Public Sector Solutions	2275 Research Blvd. Suite 360 Rockville, MD 20850	**Inside Sales – State and Local Governments, Education** Bill Fleckenstein Email: bill.fleckenstein@connection.com Phone: 800-800-0019, Ext. 34242 **Outside Sales – State and Local Governments** Wayne Kassouf Email: wayne.kassouf@connection.com Phone: 800-800-0019, Ext. 77228
	Trafera, LLC	2550 University Ave. W. Ste 315-S St. Paul, MN 55114	**Sales – State and Local Government, Education** Ryan Lapadat Email: Ryan.Lapadat@trafera.com Phone: 651-888-7922
	Y&S Technologies	383 Kingston Ave. Ste. 357 Brooklyn, NY 11213	**Sales – State and Local Government, Education** Saul Finck Email: saul@yandstech.com Phone: 718-473-0284, Ext. 203 Mordy Finck Email: mordy@yandstech.com Phone: 888-491-8910, Ext. 200
Microsoft Corporation	Direct	Orders should be placed with Authorized Resellers listed below **Contract Manager**: Tamra McKee v-mckeetamra@microsoft.com	**Senior Surface Specialist | US State & Local Government – Southeast Region** Trevor Ferguson Email: tferguson@microsoft.com Phone: 919-754-6619 Mobile: 1 (425) 538-5061 **Surface Specialist | Education** Eric Davis Email: eric.davis@microsoft.com Phone: 919-259-4599

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
	Applied Data Technologies **(HUB VENDOR)**	8515 Crown Crescent Ct. Charlotte, NC 28227 Phone: 800-267-1419 Fax: 704-847-3077	**Inside Sales for State and Local Government** Jennifer Clabeaux Jennifer.Clabeaux@applieddatatech.com Phone:704-847-3000 Fax: 704-847-3077 **Outside Sales for State and Local Government** Terri Barnes Terri.Barnes@Applieddatatech.com Phone: 704-847-3000 Fax: 704-847-3077 **Academic Sales (K-12) Local Education Authority)** Lisa Windle LisaWindle@applieddatatech.com Phone: 704-847-3000 Fax: 707-847-3077 **Academic Sales (Higher Education**) Terri Barnes TerriBarnes@applieddatatech.com Phone: 704-847-3000 Fax- 704-847-3077
Microsoft Corporation	SHI International Corp. **(HUB VENDOR)**	290 Davidson Avenue Somerset, NJ 08873 Phone: 888-764-8888	**Sales – State and Local Government, Education** SHI Carolina Team - QUOTING Email: carolinateam@shi.com Phone: 800-211-0831 **Outside Sales – State Agencies** Todd Enter Email: Todd_Enter@shi.com Phone: 336-254-3197 Carly Higginbotham Email: Carly_Higginbotham@shi.com Phone: 919-219-7355 **Outside Sales – Local Government (Raleigh Area)** Jackson Ling Email: Jackson_Ling@shi.com Phone: 910-705-7183 **Outside Sales – Local Government (Charlotte Area)** Justin Hansen Email: Justin_hansen@shi.com Phone: 704-300-9126 **Sales – Education** David Burak Email: david_burak@shi.com Phone: 704-400-3023 Corey Boyd Email: Corey_Boyd@SHI.com Phone: 678-571-9796

Awarded Vendor	Authorized Resellers	Ordering Address	Vendor/Reseller Contact Information
Microsoft Corporation	CDWG	230 N. Milwaukee Ave. Vernon Hills, IL 60061 Phone: 800-808-4239 Fax: 847-465-6800	**Inside Sales for State and Local Governments** Joseph R. Barese III Email: josebar@cdw.com Phone: 866-819-6497 Michael Karpman – **State and Local Sales Manager** Email: michkar@cdw.com Phone: 877.898.8153 **Outside Sales for State and Local Governments** Leslie Smith Email: leslie.smith@cdwg.com Phone: 919-667-4821 **Academic Sales (K-12 Local Education Authorities)** Ashley Pratt Email: ashlpra@cdw.com Phone: 866-819-6496 **Academic Sales (Higher Education)** Greg Henderson Email: greghen@cdw.com Phone: 540-494-2151
	Microsoft Store	One Microsoft Way Redmond, WA 98052 Phone: 866-425-4709 Fax: 425-658-4951	**Sales – State and Local Government, Education** Microsoft Sales Excellence Team Email: rdscommercialna@microsoft.com Phone: 866-425-4709

Table 2: Awarded Vendor's Address and Assigned Contact Information

PRICING

See Table 3 below for minimum discounts off MSRP by Vendor by Segment / Sub-Segment. To obtain specific pricing, go to NC E-Procurement @ Your Service and use the vendors' Punchout Catalogs in E-Procurement.

Minimum Discount % Off MSRP						
Segment	**Sub-Segment**	**CDW-G**	**Dell**	**HP**	**Lenovo**	**Microsoft**
Desktop Units	Desktops	4%	14%	12%	34%	
	Fixed Workstations	4%	14%	22%	34%	
	All-In-Ones	4%	14%	12%	34%	
	Thin Clients	4%	14%	16%	34%	
	Value Models	N/A	14%	1%	3%	
Portable Units	Laptops	4%	14%	12%	34%	8%
	Notebooks	4%	14%	12%	34%	
	Chromebooks	4%	14%	8%	34%	
	Mobile Workstations	4%	14%	18%	34%	
	Ultra-Portables	4%	14%	13%	34%	
	Value Models	N/A	14%	1%	3%	
2-in-1 Units	2-in-1s	4%	3%	16%	34%	8%
	Value Models	N/A	3%	1%	3%	
Tablet Units	Tablets	4%	3%	13%	34%	8%

Minimum Discount % Off MSRP						
Segment	**Sub-Segment**	**CDW-G**	**Dell**	**HP**	**Lenovo**	**Microsoft**
	Value Models	N/A	3%	1%	3%	
Peripherals	Monitors	4%	5%	10%	6%	
	Value Models (Monitors)	N/A	5%	1%	3%	
	Docking Stations	4%	5%	19%	20%	12%
	Input Devices	4%	5%	19%	20%	
	Memory	4%	5%	19%	20%	
	Hard Drives	4%	5%	19%	20%	
	Carrying Cases	4%	5%	19%	20%	
	Cables	4%	5%	19%	20%	
	All Other Peripherals	4%	5%	19%	20%	12%
Extended / Upgraded Warranties	Desktop Units	4%	17%	20%	20%	
	Portable Units	4%	17%	20%	20%	12%
	2-in-1 Units	4%	17%	20%	20%	12%
	Tablets	4%	17%	20%	20%	12%
	Monitors	4%	17%	20%	20%	
Maintenance / Support Services	Desktop Units	4%	17%	20%	20%	
	Portable Units	4%	17%	20%	20%	
	2-in-1 Units	4%	17%	20%	20%	
	Tablets	4%	17%	20%	20%	
	Monitors	4%	17%	20%	20%	

Table 3: Minimum Discount % Off MSRPs

Vendor may provide more favorable terms to the State for these items at any time during the contract.

If, during the life of this contract, a Manufacturer directly offers any special price incentives beyond what Vendors agreed to provide under this Statewide Term Contract, whether temporary or permanent, then the Vendors must make such special pricing available to all Agencies eligible to purchase from the contract.

TRANSPORTATION CHARGES

Transportation shall be **FOB Destination,** unless otherwise specified in the solicitation document or purchase order. Freight, handling, charges for pallets, charges for special shipping requirements and distribution charges shall be included in the total price of each item. Any additional charges included on the invoice shall not be honored for payment, unless authorized by change order by the Agency. In cases where parties other than the Vendor ship materials against this order, the shipper shall be instructed to show the purchase order number on all packages and shipping manifests to ensure proper identification and payment of invoices. Complete packing lists shall accompany each shipment.

DELIVERY

Vendor will complete delivery within twenty-one (21) consecutive calendar days after receipt of a Purchase Order.

RETURN OF MERCHANDISE

A Microcomputer device or related peripheral that is not performing per the specification in this IFB may be returned to the Vendor without penalty if a resolution is not achieved within thirty (30) calendar days at no additional cost to the State. Vendor shall not charge any restocking fee for unopened Microcomputer devices or related peripherals that are returned within thirty (30) calendar days of delivery date.

WARRANTY

The Vendors warrant that all equipment furnished under this contract will be new, of good material and workmanship. The warranty will be for a minimum period of twelve (12) months from date equipment is put into operation. Such replacement shall include all parts, labor, and transportation cost to the location where equipment is down, free of any charge to the owner or his representative.

EXTENDED WARRANTIES/SERVICE OPTIONS

Extended and/or Upgraded warranty service options to include quicker resolution of hardware problems, after hour support, etc. may be offered. Contact Vendor for Extended/Upgraded Warranty information on specific computer models.

ENVIRONMENTAL PROGRAMS

All Desktops, Portable Units, and Monitors offered under this contract shall meet or exceed the EPA Energy Star Requirements and shall meet or exceed the EPEAT Silver requirements.

TAXES

The State of North Carolina is exempt from Federal excise taxes and no payment will be made for any personal property taxes levied on the Vendor or for any taxes levied on employee wages. Agencies of the State may have additional exemptions or exclusions for federal or state taxes. Evidence of such additional exemptions or exclusions may be provided to Vendor by Agencies, as applicable, during the term of this contract. Applicable State or local sales taxes shall be invoiced as a separate item.

VALUE ADDED SERVICES

Contract related value-added services may be provided by the Vendors. Value added services may be, but are not limited to, training, installation, asset tagging or imaging. These additional services will be negotiated by the Agency with the contract holder in accordance with IT Policies and Procedures. The Agency is responsible for reviewing and amending, if necessary, the scope of work prior to order placement.

Table 4 contains a list of maximum pricing for certain Value-Added Services offered by the Vendors. Pricing is per unit cost for desktop or portable devices. Agencies may negotiate lower pricing with the Vendors depending upon the size and scope of the services needed for a specific procurement.

Value Added Service	CDW-G	Dell	HP Inc	Lenovo	Microsoft
Basic Imaging	$25.00	$18.00	$10.00	$19.00	TBD – contact reseller
Asset Tagging	$5.00	$15.00	$5.00	$6.00	TBD – contact reseller
Basic Installation	$188.00	$145.00	$65.00	$65.00	TBD – contact reseller

Table 4: Value Added Services Not to Exceed Pricing per Unit

HISTORY

2026-04-14: Updated Lenovo Contract Manager information.
2026-02-13: Updated Dell contact information
2025-12-19: Updated reseller information. Took out Dell - CDW and add back in Davenport Group.
2025-10-06: Updated Microsoft contact information. Replaced Gage Anderson with Trevor Ferguson.
2025-09-22: Reseller Davenport replaced with Sidepath.
2025-09-18: Reseller Data Networks of America replaced with United Data Technologies.

2025-09-09: Change reseller name Bridgetek Solutions to Lockstep Technology Group.
2025-04-21: Updated Lenovo Account Contact information from Wilburn Oziogu to Coco Peterson.
2025-03-06: Updated Lenovo contact information. Removed SHI International Corp. as Lenovo authorized 204A reseller. Added GovConnection, Inc. dba Connection Public Sector Solutions as a Lenovo authorized 204A reseller.
2024-11-05: Updated Contract Administrator to Beverly Satterfield from Debbie Patterson. Removed JD Williams as HP Account Contact.
2024-08-08: Updated link to Microsoft 204A website
2024-07-29: Exercised second one-year renewal option under Amendment 1. Updated Netcom Business Solutions, Lenovo, and Microsoft contact information.
2024-04-09: Updated Microsoft contact information
2024-03-27: Updated Dell contact information.
2024-01-29: Updated CDWG contact information
2024-01-12: Added Vivacity Tech Pbc as HP authorized 204A reseller.
2023-08-29: Updated SHI contact information.
2023-06-22: Updated HP contact information. Updated Abnormal Quantity Request procedures.
2023-05-09: Exercised one-year renewal option under Amendment 1. Updated Dell, HP, Netcom Business Solutions, and SHI contact information.
2023-03-20: Updated Microsoft Store contact email.
2023-03-16: Updated HP contact information.
2023-02-09: Updated CDWG contact information
2023-02-01: Removed BridgeTek Solutions as HP 204A reseller.
2023-01-20: Updated Lenovo contract administrator
2022-09-30: Updated Microsoft Store contact info.
2022-08-03: Updated CDWG contact info.
2022-07-13: Updated Dell contact info.
2022-06-10: Added Trafera LLC as HP authorized 204A reseller.
2022-06-07: Issued Amendment 1 to STC 204A extending contract for one year with two (2) additional one year renewal options. Updated CDWG, HP, Data Networks of America, SHI contact information. Removed World Wide Technology, LLC as HP 204A reseller.
2022-04-25: Updated CDWG contact info.
2022-04-18: Updated SHI contact info.
2022-04-07: Updated SHI contact info.
2022-03-02: Updated Abnormal Quantity Request email address.
2022-01-26: Updated Dell contact info.
2022-01-05: Updated Y&S Technologies contact info.
2021-12-28: Added Y&S Technologies as Lenovo 204A reseller.
2021-12-15: Removed Carolinas IT dba as Logically as Lenovo 204A reseller.
2021-12-10: Updated Lenovo Contract Manager information.
2021-10-07: Added Data Networks of America, Inc. as Dell 204A reseller and removed Presidio Networked Solutions LLC as Dell 204A reseller.
2021-08-24: Added Applied Data Technologies as Microsoft 204A reseller.
2021-07-08: Exercised second one-year renewal option. Updated CDWG contact information. Dell updated contact information. Updated SHI contact information.
2021-06-15: Updated Lenovo contact information.
2021-06-14: Changed name of Lenovo 204A reseller from FireFly to Trafera, LLC.
2021-04-14: Removed ePlus as Lenovo 204A reseller and added BridgeTek Solutions LLC as Lenovo reseller. Updated Lenovo Contract Manager information.
2021-03-25: Updated Abnormal Qty. instructions.
2020-12-29: Added link to Microsoft 204A website.
2020-11-23: Microsoft Corporation awarded as 204A vendor through 2020 Open Enrollment bid IFB 400203-002. Microsoft added CDWG, SHI, and Microsoft Store as Microsoft 204A resellers.
2020-11-05: Removed Alphanumeric Systems as Lenovo 204A reseller. Added FireFly Computers as Lenovo 204A reseller. Updated Dell contact information.
2020-10-06: Removed SCW as HP 204A reseller; Added World Wide Technology, LLC as HP 204A reseller.

2020-08-24: Updated SCW contact information.
2020-08-17: Updated Dell contact information. Updated SHI contact information.
2020-07-10: Updated Carolinas IT name to Carolinas IT, dba Logically.
2020-07-07: Updated SHI contact information.
2020-06-25: Updated Alphanumeric, ePlus, Davenport Group, and SHI contact information. Updated Lenovo ordering address. Exercised first one-year renewal option on contract.
2020-06-08: Updated CDWG contact information.
2020-04-17: Updated Presidio contact information.
2020-04-06: Updated Dell contact information
2020-01-14: Updated CDWG contact information
2019-11-18: Added Presidio Networked Solutions and SHI as Dell 204A resellers.
2019-10-21: Updated Lenovo contact information.
2019-07-24: Updated HP contact information.
2019-04-17: Updated Lenovo contact information.
2019-03-20: Updated Lenovo contact information
2019-02-05: Removed inactive link to E-Procurement
2018-11-06: Added BridgeTek Solutions as HP 204A reseller. Removed United Data Technologies
2018-10-25: Updated HP contact info.
2018-07-30: Updated Dell contact info.
2018-06-19: Updated Lenovo contact info.
2018-04-05: Updated Dell contact info.
2018-02-13: Added Davenport Group as Dell 204A reseller.
2018-01-31: Updated Lenovo contact information.
2018-01-23: Added ePlus as Lenovo 204A reseller and removed SCW as Lenovo 204A reseller; Added CDWG and Tiber Creek Consulting as Dell 204A reseller.
2017-12-22: Added CDWG as Lenovo 204A reseller.
2017-09-29: Added SCW as Lenovo 204A reseller.
2017-09-18: Updated Lenovo contact info.
2017-09-13: Added CDWG, Southern Computer Warehouse, and United Data Technologies, Inc. as HP 204A resellers
2017-08-22: Updated HP contact info.
2017-08-03: Updated HP contact info.
2017-08-11: Updated Dell contact info.

Union County

Dell Pro 16 - DSS

DG19330

your **davenport group** representative

Eric Likens
Client Sales Executive
eric.likens@davenportgroup.com
cell: 405-549-7179
corporate: 877-231-9114

Quote

Prepared For
Union County
2330 Concord Ave
Monroe, NC 28112

Vann Dale
vann.dale@unioncountync.gov

Quote Number	DG19330
Quote Date	07/15/2026
Quote Expiration	07/15/2026

Contract Code(s)
NCDIT 204A

Executive Summary

This is prepared for the Union County Department of Social Services

Quote

davenportgroup

Qty	Description	Unit Price	Ex. Price
70	Dell Pro 16 PC16250 16", Non-Touch, FHD+, IPS, 300 nits, 45% NTSC, Anti-Glare, FHD+IR Cam Intel(R) Core(TM) Ultra 5 235U vPro(R) (12 TOPS NPU, 12 cores, up to 4.9 GHz 16 GB: 1 x 16 GB, DDR5, 5600 MT/s, single channel 512 GB SSD Windows 11 Pro Integrated Intel(R) graphics for Intel(R) Core(TM) Ultra 5 235U vPro(R) processor English US backlit Copilot key keyboard with numeric keypad Intel(R) Wi-Fi 6E AX211, Qualified against Bluetooth(R) Core 5.4 wireless Card 3-cell, 55 Wh, ExpressCharge Capable, ExpressCharge Boost Capable 65W USB-C AC adapter E4 Power Cord 1M for US ProSupport Plus: Next Business Day Onsite, 4 Years	$1,390.00	$97,300.00

Total **$97,300.00**

Payment Terms

Payment for products, software, subscriptions, and maintenance is Net 30 from the invoice date unless otherwise agreed upon. Davenport Group Care Services are considered maintenance for the purpose of these terms.

Professional Services are invoiced separately upon completion. Payment will be Net 30 from the invoice date.

Recurring contracts will be reconciled based on actual usage, with invoice adjustments to match the preceding term's use. Metered products billed periodically require payment upon receipt of the invoice.

Block Hours require payment in advance upon receipt of the invoice.

Payment Methods

We accept ACH, bank-to-bank transfer, and credit card payments. A 4% processing fee applies to credit card transactions.

Pricing

Pricing is valid through the expiration date stated in the quote, after which it is subject to change. Supplier provisions that alter pricing may affect subscription renewals. Equipment and third-party product pricing are based on manufacturer pricing in effect at the time of the quote and are subject to change without notice. Davenport Group will notify the customer of any manufacturer pricing changes at the time of invoicing.

Products listed may be subject to tariffs imposed by governmental authorities. Tariff charges are not included in the quoted prices and will be added to the invoice. Applicable taxes and shipping will also be included.

This proposal is subject to credit approval. Davenport Group reserves the right to cancel orders arising from pricing or other errors.

Cancellations, Late Fees & Non-Payment

Cancellation: Non-term and out-of-contract software contracts require 30 days' written notice for cancellation.

Late Fees: A 1.5% monthly fee will be assessed on past due amounts.

Non-Payment: Davenport Group reserves the right to cancel orders if payment is not received in accordance with these terms.

Returns & Inspections

Return Policy: Returns are not accepted unless the manufacturer confirms a product as defective. In such cases, Davenport Group will engage the manufacturer under its terms to replace or rectify the defective product.

Inspection: Customer must inspect all shipments upon receipt and notify Davenport Group within three (3) business days of any discrepancies or damaged items. Davenport Group cannot take corrective action after this period.

*****Quotes and pricing terms are confidential and proprietary to Customer and may not be reproduced or distributed without Davenport Group's written consent. By proceeding with the purchase, Customer agrees to these terms.

Thank you for your business!

Signature **Date**

Purchase Order Information

If applicable, please enter the PO Number and Shipping Address below.

By submitting a purchase order, referencing the Davenport Group quote number DG19330, Customer agrees to be bound by the terms and conditions referenced herein.

**These fields are optional*

PO Number _____

Ship to Name _____

Street _____

City _____

State
Use 2 Character Abbreviation
_____

Postal Code _____

Union County

Dell Pro 16, Dell Pro Rugged 14, Dell Pro 14 Plus, Dell Pro Micro, Dell Pro Dock

DG19337

your **davenport group** representative

Eric Likens
Client Sales Executive
eric.likens@davenportgroup.com
cell: 405-549-7179
corporate: 877-231-9114

Quote

Prepared For
Union County
500 North Main Street
#843
Monroe, NC 28112

Vann Dale
vann.dale@unioncountync.gov

Quote Number DG19337
Quote Date 07/14/2026

Quote Expiration 07/15/2026

Contract Code(s)
NCDIT 204A

Qty	Description	Unit Price	Ex. Price
106	Dell Pro 16 PC16250 16", Non-Touch, FHD+, IPS, 300 nits, 45% NTSC, Anti-Glare, FHD+IR Cam Intel(R) Core(TM) Ultra 5 235U vPro(R) (12 TOPS NPU, 12 cores, up to 4.9 GHz) 16 GB: 1 x 16 GB, DDR5, 5600 MT/s, single channel 512 GB SSD Windows 11 Pro Integrated Intel(R) graphics for Intel(R) Core(TM) Ultra 5 235U vPro(R) processor English US backlit Copilot key keyboard with numeric keypad Intel(R) Wi-Fi 6E AX211, Qualified against Bluetooth(R) Core 5.4 wireless Card 3-cell, 55 Wh, ExpressCharge Capable, ExpressCharge Boost Capable 65W USB-C AC adapter E4 Power Cord 1M for US ProSupport Plus - Next Business Day Onsite & Accidental Damage - 4 Years	$1,390.00	$147,340.00
14	Dell Pro Rugged 14 RB14250 14" Touch, FHD 1920x1080, 60Hz, WVA, Anti-Glare, 1100nit, Low Blue Light, IR camera, Passive Pen Intel(R) Core(TM) Ultra 5 135U (12 MB cache, 12 cores, up to 4.40 GHz, 15W) 16GB: 2 X 8 GB, DDR5, 5600, Non-ECC, SoDIMM 512GB PCIe NVMe 2230 SSD Windows 11 Pro Intel R Core TM Ultra 5 135U (12 MB cache, 12 cores, up to 4.40 GHz, 15W), Intel Integrated Graphics English US Rugged RGB Single Point backlit Copilot key keyboard Intel® Wi-Fi 6E AX211, 2x2, 802.11ax, MU-MIMO, Bluetooth® 5.3 wireless card	$3,182.00	$44,548.00

Quote



Qty	Description	Unit Price	Ex. Price
	Primary 3 Cell 53.5 Whr Long-lifecycle Battery, 3-year warranty Additional 3 Cell 53.5 Whr Long-lifecycle Battery, 3-year warranty 65W USB-C AC adapter E4 C5 black Power Cord 1M, US ENERGY STAR Qualified EPEAT Gold with Climate+ ProSupport Plus: Accidental Damage Service, Keep Your Hard Drive, 7X24 Technical Support- 5 Years		
4	Dell Pro 14 Plus PB14250 Dell Pro 14 Plus (PB14250) XCTO Base 2in1, 14", Touch, FHD+, 300 nit, ComfortView+, 100% sRGB, Pen Support, 5MP+IR Cam Intel(R) Core(TM) Ultra 5 236V, vPro(R) (8 cores, up to 4.7 GHz, 40 TOPS NPU) 16 GB LPDDR5x, 8533 MT/s, dual-channel (onboard) 1 TB TLC SSD Windows 11 Pro, Copilot+ PC ENERGY STAR Qualified EPEAT Gold with Climate+ Integrated Intel Arc graphics for Intel Core Ultra 5 236V vPro processor, 16 GB LPDDR5x memory English US backlit Copilot key keyboard, 79-key Intel Wi-Fi 7 BE201, 2x2, 802.11be, Bluetooth 5.4 wireless card 3-cell, 55 Wh, ExpressCharge Capable, Long Life Cycle, 3-year limited hardware warranty 65W USB-C AC adapter E4 Power Cord 1M for US ProSupport Plus: Next Business Day Onsite Service, Accidental Damage Service, Keep Your Hard Drive and 7x24 Technical Support, 5 years Dell Additional SW - Dell Pro Laptop	$2,325.00	$9,300.00
87	Dell Pro Micro QCM1250 Intel Core Ultra 5 235T, 14 Cores, up to 5.0GHz, 13 TOPS NPU 16GB DDR5 5600MT/s (1x16GB) 512GB SSD Windows 11 Pro Intel Integrated Graphics Intel Wi-Fi 6E AX211 (2x2) + Bluetooth USB-C with DisplayPort Alt Mode & Power-In Support, No RAID 90W AC Adapter with US Power Cord Dell ProSupport 5-Year (NBD Onsite + 24x7 Technical Support)	$1,121.00	$97,527.00
30	Dell Pro Dock - WD25 Dell Limited Hardware Warranty Advanced Exchange Service 3 Years	$158.00	$4,740.00

Quote

Qty	Description	Unit Price	Ex. Price
		Total	**$303,455.00**

Payment Terms

Payment for products, software, subscriptions, and maintenance is Net 30 from the invoice date unless otherwise agreed upon. Davenport Group Care Services are considered maintenance for the purpose of these terms.

Professional Services are invoiced separately upon completion. Payment will be Net 30 from the invoice date.

Recurring contracts will be reconciled based on actual usage, with invoice adjustments to match the preceding term's use. Metered products billed periodically require payment upon receipt of the invoice.

Block Hours require payment in advance upon receipt of the invoice.

Payment Methods

We accept ACH, bank-to-bank transfer, and credit card payments. A 4% processing fee applies to credit card transactions.

Pricing

Pricing is valid through the expiration date stated in the quote, after which it is subject to change. Supplier provisions that alter pricing may affect subscription renewals. Equipment and third-party product pricing are based on manufacturer pricing in effect at the time of the quote and are subject to change without notice. Davenport Group will notify the customer of any manufacturer pricing changes at the time of invoicing.

Products listed may be subject to tariffs imposed by governmental authorities. Tariff charges are not included in the quoted prices and will be added to the invoice. Applicable taxes and shipping will also be included.

This proposal is subject to credit approval. Davenport Group reserves the right to cancel orders arising from pricing or other errors.

Cancellations, Late Fees & Non-Payment

Cancellation: Non-term and out-of-contract software contracts require 30 days' written notice for cancellation.

Late Fees: A 1.5% monthly fee will be assessed on past due amounts.

Non-Payment: Davenport Group reserves the right to cancel orders if payment is not received in accordance with these terms.

Returns & Inspections

Return Policy: Returns are not accepted unless the manufacturer confirms a product as defective. In such cases, Davenport Group will engage the manufacturer under its terms to replace or rectify the defective product.

Inspection: Customer must inspect all shipments upon receipt and notify Davenport Group within three (3) business days of any discrepancies or damaged items. Davenport Group cannot take corrective action after this period.

*****Quotes and pricing terms are confidential and proprietary to Customer and may not be reproduced or distributed without Davenport Group's written consent. By proceeding with the purchase, Customer agrees to these terms.

Thank you for your business!

Signature **Date**

Purchase Order Information

If applicable, please enter the PO Number and Shipping Address below.

By submitting a purchase order, referencing the Davenport Group quote number DG19337, Customer agrees to be bound by the terms and conditions referenced herein.

**These fields are optional*

PO Number _____

Ship to Name _____

Street _____

City _____

State
***Use 2 Character Abbreviation**
_____

Postal Code _____

Union County, NC

Staff Report

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

File #: 26-363 **Agenda Date:** 7/20/2026

TITLE:

Tax Bill Correction Report for May 2026

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the Tax Bill Correction Reports for May 2026.

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:

May Refund amount = $212.70

Correction Listing Report

Union County

Date Posted between 5/1/2026 and 5/31/2026

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002168	04072015E	RE	2025	FRANKLIN, JOHNNY	5/5/2026	Value	578,415	1,003,900	425,485		EXCLUSION STATUS CHANGE
						Tax	2,765.98	4,800.65	2,034.67		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,765.98	4,800.65	2,034.67	0.00	
2025002211	04249015	RE	2025	COUICK, GARRETT ADAM	5/14/2026	Value	215,213	330,800	115,587		EXCLUSION STATUS CHANGE
						Tax	1,036.46	1,593.13	556.67		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,036.46	1,593.13	556.67	0.00	
2025002211	04249015	RE	2024	COUICK, GARRETT ADAM	5/14/2026	Value	109,976	178,200	68,224		EXCLUSION STATUS CHANGE
						Tax	707.36	1,146.18	438.82		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	707.36	1,146.18	438.82	0.00	
2025002211	04249015	RE	2023	COUICK, GARRETT ADAM	5/14/2026	Value	109,976	178,200	68,224		EXCLUSION STATUS CHANGE
						Tax	697.69	1,130.50	432.81		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	697.69	1,130.50	432.81	0.00	
2025002167	05129010C	RE	2025	BYRUM, ELIZABETH N & BONAVITA, RICHARD E II	5/5/2026	Value	219,669	304,800	85,131		EXCLUSION STATUS CHANGE
						Tax	1,054.85	1,463.65	408.80		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,054.85	1,463.65	408.80	0.00	
2025002167	05129010C	RE	2024	BYRUM, ELIZABETH N & BONAVITA, RICHARD E II	5/5/2026	Value	97,540	152,100	54,560		EXCLUSION STATUS CHANGE
						Tax	624.55	973.90	349.35		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	624.55	973.90	349.35	0.00	

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Correction Listing Report

Union County

Date Posted between 5/1/2026 and 5/31/2026

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002167	05129010C	RE	2023	BYRUM, ELIZABETH N & BONAVITA, RICHARD E II	5/5/2026	**Value**	97,540	152,100	54,560		EXCLUSION STATUS CHANGE
						Tax	614.41	958.08	343.67		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	614.41	958.08	343.67	0.00	
2025002167	05129010C	RE	2022	BYRUM, ELIZABETH N & BONAVITA, RICHARD E II	5/5/2026	**Value**	97,540	152,100	54,560		EXCLUSION STATUS CHANGE
						Tax	614.41	958.08	343.67		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	614.41	958.08	343.67	0.00	
2025002167	05129010C	RE	2021	BYRUM, ELIZABETH N & BONAVITA, RICHARD E II	5/5/2026	**Value**	97,540	152,100	54,560		EXCLUSION STATUS CHANGE
						Tax	612.84	955.64	342.80		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	612.84	955.64	342.80	0.00	
2025002205	07126099	RE	2025	HARRIS, ROBERT EDWARD HEIR	5/12/2026	**Value**	127,430	254,900	127,470		EXCLUSION STATUS CHANGE
						Tax	853.02	1,706.30	853.28		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	853.02	1,706.30	853.28	0.00	
2025002205	07126099	RE	2024	HARRIS, ROBERT EDWARD HEIR	5/12/2026	**Value**	88,200	176,400	88,200		EXCLUSION STATUS CHANGE
						Tax	756.31	1,512.63	756.32		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	756.31	1,512.63	756.32	0.00	
2025002205	07126099	RE	2023	HARRIS, ROBERT EDWARD HEIR	5/12/2026	**Value**	88,200	176,400	88,200		EXCLUSION STATUS CHANGE
						Tax	724.83	1,449.66	724.83		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	724.83	1,449.66	724.83	0.00	

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Correction Listing Report

Union County

Date Posted between 5/1/2026 and 5/31/2026

Correction Type : Exclusion Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002205	07126099	RE	2022	HARRIS, ROBERT EDWARD HEIR	5/12/2026	Value	88,200	176,400	88,200		EXCLUSION STATUS CHANGE
						Tax	724.83	1,449.66	724.83		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	724.83	1,449.66	724.83	0.00	
2025002205	07126099	RE	2021	HARRIS, ROBERT EDWARD HEIR	5/12/2026	Value	88,200	176,400	88,200		EXCLUSION STATUS CHANGE
						Tax	724.30	1,448.60	724.30		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	724.30	1,448.60	724.30	0.00	
				Totals for Type Exclusion Change - Discovery :		**Value**	**2,103,639**	**3,564,800**	**1,461,161**		
						Tax	**12,511.84**	**21,546.66**	**9,034.82**		
						LL	**0.00**	**0.00**	**0.00**		
						INT	**0.00**	**0.00**	**0.00**		
						Tax TTL	**12,511.84**	**21,546.66**	**9,034.82**	**0.00**	

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002165	01003002	RE	2025	GRISSOM VALLEY RANCH LLC	5/5/2026	Value	386,100	425,880	39,780		PUV ROLLBACK
						Tax	1,951.74	2,152.83	201.09		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	10.05	10.05		
						Tax TTL	1,951.74	2,162.88	211.14	0.00	

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Correction Listing Report

Union County

Date Posted between 5/1/2026 and 5/31/2026

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002165	01003002	RE	2024	GRISSOM VALLEY RANCH LLC	5/5/2026	Value	360,500	378,450	17,950		PUV ROLLBACK
						Tax	2,331.71	2,447.81	116.10		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	16.25	16.25		
						Tax TTL	2,331.71	2,464.06	132.35	0.00	
2025002165	01003002	RE	2023	GRISSOM VALLEY RANCH LLC	5/5/2026	Value	424,800	442,750	17,950		PUV ROLLBACK
						Tax	2,660.95	2,773.39	112.44		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	25.86	25.86		
						Tax TTL	2,660.95	2,799.25	138.30	0.00	
2025002189	01027009A	RE	2025	LITTLE, RONALD L TRUSTEE & LITTLE, DORIS C TRUSTEE	5/8/2026	Value	393,700	429,730	36,030		PUV ROLLBACK
						Tax	1,990.16	2,172.29	182.13		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	9.10	9.10		
						Tax TTL	1,990.16	2,181.39	191.23	0.00	
2025002189	01027009A	RE	2024	LITTLE, RONALD L TRUSTEE & LITTLE, DORIS C TRUSTEE	5/8/2026	Value	358,110	364,270	6,160		PUV ROLLBACK
						Tax	2,316.25	2,356.09	39.84		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	5.58	5.58		
						Tax TTL	2,316.25	2,361.67	45.42	0.00	
2025002189	01027009A	RE	2023	LITTLE, RONALD L TRUSTEE & LITTLE, DORIS C TRUSTEE	5/8/2026	Value	358,110	364,270	6,160		PUV ROLLBACK
						Tax	2,243.20	2,281.79	38.59		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	8.87	8.87		
						Tax TTL	2,243.20	2,290.66	47.46	0.00	
2025002220	01129002	RE	2025	CLARK, JENNIFER HOWELL	5/18/2026	Value	101,300	124,920	23,620		PUV ROLLBACK
						Tax	512.07	631.47	119.40		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	5.97	5.97		
						Tax TTL	512.07	637.44	125.37	0.00	

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Correction Listing Report

Union County

Date Posted between 5/1/2026 and 5/31/2026

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002220	01129002	RE	2024	CLARK, JENNIFER HOWELL	5/18/2026	**Value**	88,300	97,120	8,820		PUV ROLLBACK
						Tax	571.13	628.18	57.05		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	7.99	7.99		
						Tax TTL	571.13	636.17	65.04	0.00	
2025002220	01129002	RE	2023	CLARK, JENNIFER HOWELL	5/18/2026	**Value**	24,300	33,120	8,820		PUV ROLLBACK
						Tax	152.21	207.46	55.25		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	12.71	12.71		
						Tax TTL	152.21	220.17	67.96	0.00	
2025002172	03171007	RE	2025	COLE, DORIS M & COLE, JAMES S	5/6/2026	**Value**	226,600	234,770	8,170		PUV ROLLBACK
						Tax	1,130.28	1,171.03	40.75		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	2.04	2.04		
						Tax TTL	1,130.28	1,173.07	42.79	0.00	
2025002172	03171007	RE	2024	COLE, DORIS M & COLE, JAMES S	5/6/2026	**Value**	174,000	178,230	4,230		PUV ROLLBACK
						Tax	1,162.32	1,190.58	28.26		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	3.96	3.96		
						Tax TTL	1,162.32	1,194.54	32.22	0.00	
2025002172	03171007	RE	2023	COLE, DORIS M & COLE, JAMES S	5/6/2026	**Value**	174,000	178,230	4,230		PUV ROLLBACK
						Tax	1,143.01	1,170.80	27.79		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	6.40	6.40		
						Tax TTL	1,143.01	1,177.20	34.19	0.00	
2025002209	04216010A	RE	2025	RAINES, KEVIN JOHN & RAINES, MICHELE RENEE	5/13/2026	**Value**	278,600	295,950	17,350		PUV ROLLBACK
						Tax	1,284.07	1,364.04	79.97		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	4.00	4.00		
						Tax TTL	1,284.07	1,368.04	83.97	0.00	

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2025002209	04216010A	RE	2024	RAINES, KEVIN JOHN & RAINES, MICHELE RENEE	5/13/2026	**Value**	271,400	280,440	9,040		PUV ROLLBACK
						Tax	1,696.53	1,753.04	56.51		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	7.91	7.91		
						Tax TTL	1,696.53	1,760.95	64.42	0.00	
2025002209	04216010A	RE	2023	RAINES, KEVIN JOHN & RAINES, MICHELE RENEE	5/13/2026	**Value**	271,400	280,440	9,040		PUV ROLLBACK
						Tax	1,685.12	1,741.25	56.13		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	12.91	12.91		
						Tax TTL	1,685.12	1,754.16	69.04	0.00	
2025002156	05039006A	RE	2025	COUICK, HELEN C	5/1/2026	**Value**	247,700	275,240	27,540		PUV ROLLBACK
						Tax	1,185.98	1,317.84	131.86		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	6.60	6.60		
						Tax TTL	1,185.98	1,324.44	138.46	0.00	
2025002156	05039006A	RE	2024	COUICK, HELEN C	5/1/2026	**Value**	116,400	125,700	9,300		PUV ROLLBACK
						Tax	742.86	802.21	59.35		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	8.31	8.31		
						Tax TTL	742.86	810.52	67.66	0.00	
2025002156	05039006A	RE	2023	COUICK, HELEN C	5/1/2026	**Value**	116,400	125,700	9,300		PUV ROLLBACK
						Tax	730.87	789.26	58.39		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	13.43	13.43		
						Tax TTL	730.87	802.69	71.82	0.00	
2025002156	05039006A	RE	2022	COUICK, HELEN C	5/1/2026	**Value**	116,400	125,700	9,300		PUV ROLLBACK
						Tax	730.87	789.26	58.39		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	18.69	18.69		
						Tax TTL	730.87	807.95	77.08	0.00	

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2025002157	05039024B	RE	2025	COUICK, HELEN C	5/1/2026	Value	1,700	112,110	110,410		PUV ROLLBACK
						Tax	8.14	536.78	528.64		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	26.43	26.43		
						Tax TTL	8.14	563.21	555.07	0.00	
2025002157	05039024B	RE	2024	COUICK, HELEN C	5/1/2026	Value	1,700	41,070	39,370		PUV ROLLBACK
						Tax	10.85	262.11	251.26		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	35.18	35.18		
						Tax TTL	10.85	297.29	286.44	0.00	
2025002157	05039024B	RE	2023	COUICK, HELEN C	5/1/2026	Value	1,700	41,070	39,370		PUV ROLLBACK
						Tax	10.68	257.88	247.20		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	56.85	56.85		
						Tax TTL	10.68	314.73	304.05	0.00	
2025002157	05039024B	RE	2022	COUICK, HELEN C	5/1/2026	Value	1,700	41,070	39,370		PUV ROLLBACK
						Tax	10.68	257.88	247.20		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	79.10	79.10		
						Tax TTL	10.68	336.98	326.30	0.00	
2025002155	06072006	RE	2023	CARLTON, VIRGIE ANN PLYLER	5/1/2026	Value	820,310	1,034,070	213,760		PUV ROLLBACK
						Tax	5,236.86	6,601.50	1,364.64		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	313.86	313.86		
						Tax TTL	5,236.86	6,915.36	1,678.50	0.00	
2025002155	06072006	RE	2022	CARLTON, VIRGIE ANN PLYLER	5/1/2026	Value	812,410	1,026,170	213,760		PUV ROLLBACK
						Tax	5,186.43	6,551.07	1,364.64		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	436.68	436.68		
						Tax TTL	5,186.43	6,987.75	1,801.32	0.00	

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2025002154	06072006F	RE	2025	PLYLER, JOHN DANIEL	5/1/2026	**Value**	1,200	417,200	416,000		PUV ROLLBACK
						Tax	5.84	2,032.18	2,026.34		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	101.32	101.32		
						Tax TTL	5.84	2,133.50	2,127.66	0.00	
2025002154	06072006F	RE	2024	PLYLER, JOHN DANIEL	5/1/2026	**Value**	1,200	114,500	113,300		PUV ROLLBACK
						Tax	7.73	737.72	729.99		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	102.20	102.20		
						Tax TTL	7.73	839.92	832.19	0.00	
2025002158	06105022	RE	2025	GRIFFIN, MARLENE & GRIFFIN, DAVID JETER	5/1/2026	**Value**	91,800	101,390	9,590		PUV ROLLBACK
						Tax	447.15	493.86	46.71		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	2.33	2.33		
						Tax TTL	447.15	496.19	49.04	0.00	
2025002158	06105022	RE	2024	GRIFFIN, MARLENE & GRIFFIN, DAVID JETER	5/1/2026	**Value**	45,200	49,430	4,230		PUV ROLLBACK
						Tax	291.22	318.47	27.25		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	3.82	3.82		
						Tax TTL	291.22	322.29	31.07	0.00	
2025002158	06105022	RE	2023	GRIFFIN, MARLENE & GRIFFIN, DAVID JETER	5/1/2026	**Value**	45,200	49,430	4,230		PUV ROLLBACK
						Tax	288.56	315.56	27.00		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	6.21	6.21		
						Tax TTL	288.56	321.77	33.21	0.00	
2025002158	06105022	RE	2022	GRIFFIN, MARLENE & GRIFFIN, DAVID JETER	5/1/2026	**Value**	45,200	49,430	4,230		PUV ROLLBACK
						Tax	288.56	315.56	27.00		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	8.64	8.64		
						Tax TTL	288.56	324.20	35.64	0.00	

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2025002247	06141004	RE	2025	HOWIE ELIZABETH R FAMILY L	5/29/2026	**Value**	56,500	7,204,400	7,147,900		PUV ROLLBACK
						Tax	435.16	55,488.29	55,053.13		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	2,752.65	2,752.65		
						Tax TTL	435.16	58,240.94	57,805.78	0.00	
2025002247	06141004	RE	2024	HOWIE ELIZABETH R FAMILY L	5/29/2026	**Value**	54,900	2,792,600	2,737,700		PUV ROLLBACK
						Tax	562.89	28,632.53	28,069.64		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	3,929.75	3,929.75		
						Tax TTL	562.89	32,562.28	31,999.39	0.00	
2025002247	06141004	RE	2023	HOWIE ELIZABETH R FAMILY L	5/29/2026	**Value**	54,900	2,792,600	2,737,700		PUV ROLLBACK
						Tax	557.18	28,342.10	27,784.92		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	6,390.53	6,390.53		
						Tax TTL	557.18	34,732.63	34,175.45	0.00	
2025002198	06153010	RE	2025	KRATT, LAURA KATHERINE & KRATT, WILLIAM E	5/11/2026	**Value**	5,600	1,533,300	1,527,700		PUV ROLLBACK
						Tax	27.98	7,660.37	7,632.39		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	381.62	381.62		
						Tax TTL	27.98	8,041.99	8,014.01	0.00	
2025002198	06153010	RE	2024	KRATT, LAURA KATHERINE & KRATT, WILLIAM E	5/11/2026	**Value**	5,400	1,566,600	1,561,200		PUV ROLLBACK
						Tax	35.25	10,226.76	10,191.51		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	1,426.81	1,426.81		
						Tax TTL	35.25	11,653.57	11,618.32	0.00	
2025002198	06153010	RE	2023	KRATT, LAURA KATHERINE & KRATT, WILLIAM E	5/11/2026	**Value**	5,400	1,566,600	1,561,200		PUV ROLLBACK
						Tax	34.18	9,916.58	9,882.40		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	2,272.95	2,272.95		
						Tax TTL	34.18	12,189.53	12,155.35	0.00	

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2025002198	06153010	RE	2022	KRATT, LAURA KATHERINE & KRATT, WILLIAM E	5/11/2026	Value	5,400	1,566,600	1,561,200		PUV ROLLBACK
						Tax	34.35	9,963.58	9,929.23		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	3,177.35	3,177.35		
						Tax TTL	34.35	13,140.93	13,106.58	0.00	
2025002163	08042013C	RE	2025	SMITH, MARTY EDWARD	5/4/2026	Value	295,500	384,400	88,900		PUV ROLLBACK
						Tax	1,493.75	1,943.14	449.39		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	22.47	22.47		
						Tax TTL	1,493.75	1,965.61	471.86	0.00	
2025002163	08042013C	RE	2024	SMITH, MARTY EDWARD	5/4/2026	Value	213,600	246,700	33,100		PUV ROLLBACK
						Tax	1,381.57	1,595.66	214.09		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	29.97	29.97		
						Tax TTL	1,381.57	1,625.63	244.06	0.00	
2025002163	08042013C	RE	2023	SMITH, MARTY EDWARD	5/4/2026	Value	213,600	246,700	33,100		PUV ROLLBACK
						Tax	1,337.99	1,545.33	207.34		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	47.69	47.69		
						Tax TTL	1,337.99	1,593.02	255.03	0.00	
2025002162	08231007C	RE	2025	CARRIKER, KYLEN M & CARRIKER, DELIA R	5/4/2026	Value	37,500	187,750	150,250		PUV ROLLBACK
						Tax	190.58	954.15	763.57		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	38.18	38.18		
						Tax TTL	190.58	992.33	801.75	0.00	
2025002162	08231007C	RE	2024	CARRIKER, KYLEN M & CARRIKER, DELIA R	5/4/2026	Value	17,000	74,770	57,770		PUV ROLLBACK
						Tax	114.86	505.21	390.35		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	54.65	54.65		
						Tax TTL	114.86	559.86	445.00	0.00	

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2025002162	08231007C	RE	2023	CARRIKER, KYLEN M & CARRIKER, DELIA R	5/4/2026	**Value**	17,000	74,770	57,770		PUV ROLLBACK
						Tax	113.80	500.51	386.71		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	88.94	88.94		
						Tax TTL	113.80	589.45	475.65	0.00	
2025002222	U4225003F	RE	2025	BUFORD TOWNSHIP FARMS LLC	5/20/2026	**Value**	25,000	33,150	8,150		PUV ROLLBACK
						Tax	115.22	152.78	37.56		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	1.88	1.88		
						Tax TTL	115.22	154.66	39.44	0.00	
2025002222	U4225003F	RE	2024	BUFORD TOWNSHIP FARMS LLC	5/20/2026	**Value**	24,700	29,220	4,520		PUV ROLLBACK
						Tax	154.40	182.65	28.25		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	3.96	3.96		
						Tax TTL	154.40	186.61	32.21	0.00	
2025002222	U4225003F	RE	2023	BUFORD TOWNSHIP FARMS LLC	5/20/2026	**Value**	24,700	29,220	4,520		PUV ROLLBACK
						Tax	153.36	181.42	28.06		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	6.45	6.45		
						Tax TTL	153.36	187.87	34.51	0.00	
				Totals for Type PUV Rollback :		**Value**	**7,414,140**	**28,167,230**	**20,753,090**		
						Tax	**44,756.55**	**204,212.25**	**159,455.70**		
						LL	**0.00**	**0.00**	**0.00**		
						INT	**0.00**	**21,985.10**	**21,985.10**		
						Tax TTL	**44,756.55**	**226,197.35**	**181,440.80**	**0.00**	

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2025002240	408189	PP	2024	CAROLINA GREEN CORPORATION	5/28/2026	**Value**	4,011,941	4,087,501	75,560		TMA AUDIT DISCOVERY
						Tax	26,819.83	27,324.94	505.11		
Public Notes:						**LL**	0.00	101.02	101.02		
						INT	0.00	0.00	0.00		
						Tax TTL	26,819.83	27,425.96	606.13	0.00	
2025002240	408189	PP	2023	CAROLINA GREEN CORPORATION	5/28/2026	**Value**	3,588,518	3,660,321	71,803		TMA AUDIT DISCOVERY
						Tax	23,623.21	24,095.89	472.68		
Public Notes:						**LL**	0.00	141.80	141.80		
						INT	0.00	0.00	0.00		
						Tax TTL	23,623.21	24,237.69	614.48	0.00	
2025002240	408189	PP	2022	CAROLINA GREEN CORPORATION	5/28/2026	**Value**	3,536,430	3,611,070	74,640		TMA AUDIT DISCOVERY
						Tax	23,280.32	23,771.67	491.35		
Public Notes:						**LL**	0.00	196.54	196.54		
						INT	0.00	0.00	0.00		
						Tax TTL	23,280.32	23,968.21	687.89	0.00	
2025002240	408189	PP	2021	CAROLINA GREEN CORPORATION	5/28/2026	**Value**	3,179,642	3,245,352	65,710		TMA AUDIT DISCOVERY
						Tax	20,953.84	21,386.87	433.03		
Public Notes:						**LL**	2,095.38	2,311.94	216.56		
						INT	0.00	0.00	0.00		
						Tax TTL	23,049.22	23,698.81	649.59	0.00	
2025002228	409176	PP	2025	HAMMOCK DMD & LOTAKIS IV P	5/22/2026	**Value**	177,505	186,485	8,980		TMA AUDIT DISCOVERY
						Tax	1,551.75	1,630.25	78.50		
Public Notes:						**LL**	155.18	170.88	15.70		
						INT	0.00	0.00	0.00		
						Tax TTL	1,706.93	1,801.13	94.20	0.00	
2025002228	409176	PP	2024	HAMMOCK DMD & LOTAKIS IV P	5/22/2026	**Value**	181,816	183,554	1,738		TMA AUDIT DISCOVERY
						Tax	1,982.70	2,001.66	18.96		
Public Notes:						**LL**	0.00	5.69	5.69		
						INT	0.00	0.00	0.00		
						Tax TTL	1,982.70	2,007.35	24.65	0.00	

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2025002199	410032	PP	2025	FOSTER GRACE INSURANCE AGE	5/11/2026	**Value**	42,657	57,462	14,805		TMA AUDIT DISCOVERY
						Tax	372.91	502.33	129.42		
Public Notes:						**LL**	37.29	63.17	25.88		
						INT	0.00	0.00	0.00		
						Tax TTL	410.20	565.50	155.30	0.00	
2025002199	410032	PP	2024	FOSTER GRACE INSURANCE AGE	5/11/2026	**Value**	45,445	62,003	16,558		TMA AUDIT DISCOVERY
						Tax	495.58	676.14	180.56		
Public Notes:						**LL**	49.56	103.73	54.17		
						INT	0.00	0.00	0.00		
						Tax TTL	545.14	779.87	234.73	0.00	
2025002199	410032	PP	2022	FOSTER GRACE INSURANCE AGE	5/11/2026	**Value**	26,019	27,797	1,778		TMA AUDIT DISCOVERY
						Tax	283.74	303.13	19.39		
Public Notes:						**LL**	28.37	38.07	9.70		
						INT	0.00	0.00	0.00		
						Tax TTL	312.11	341.20	29.09	0.00	
2025002199	410032	PP	2021	FOSTER GRACE INSURANCE AGE	5/11/2026	**Value**	5,548	8,062	2,514		TMA AUDIT DISCOVERY
						Tax	71.32	103.64	32.32		
Public Notes:						**LL**	7.13	26.53	19.40		
						INT	0.00	0.00	0.00		
						Tax TTL	78.45	130.17	51.72	0.00	
2025002192	410561	PP	2024	HARGETT FARMS LLC	5/8/2026	**Value**	1,482,448	1,498,978	16,530		TMA AUDIT DISCOVERY
						Tax	9,902.75	10,013.17	110.42		
Public Notes:						**LL**	0.00	33.13	33.13		
						INT	0.00	0.00	0.00		
						Tax TTL	9,902.75	10,046.30	143.55	0.00	
2025002233	410590	PP	2025	HARRIS TEETER LLC 7350	5/26/2026	**Value**	7,620,539	7,639,128	18,589		TMA AUDIT DISCOVERY
						Tax	66,618.75	66,781.26	162.51		
Public Notes:						**LL**	0.00	16.25	16.25		
						INT	0.00	0.00	0.00		
						Tax TTL	66,618.75	66,797.51	178.76	0.00	

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2025002232	410590	PP	2024	HARRIS TEETER LLC 7350	5/26/2026	**Value**	8,073,742	8,106,125	32,383		TMA AUDIT DISCOVERY
						Tax	88,044.16	88,397.29	353.13		
Public Notes:						**LL**	0.00	70.63	70.63		
						INT	0.00	0.00	0.00		
						Tax TTL	88,044.16	88,467.92	423.76	0.00	
2025002232	410590	PP	2023	HARRIS TEETER LLC 7350	5/26/2026	**Value**	8,075,492	8,112,370	36,878		TMA AUDIT DISCOVERY
						Tax	88,063.24	88,465.39	402.15		
Public Notes:						**LL**	0.00	120.65	120.65		
						INT	0.00	0.00	0.00		
						Tax TTL	88,063.24	88,586.04	522.80	0.00	
2025002232	410590	PP	2022	HARRIS TEETER LLC 7350	5/26/2026	**Value**	5,590,488	5,626,375	35,887		TMA AUDIT DISCOVERY
						Tax	60,964.27	61,355.62	391.35		
Public Notes:						**LL**	0.00	156.54	156.54		
						INT	0.00	0.00	0.00		
						Tax TTL	60,964.27	61,512.16	547.89	0.00	
2025002232	410590	PP	2021	HARRIS TEETER LLC 7350	5/26/2026	**Value**	4,596,075	4,636,931	40,856		TMA AUDIT DISCOVERY
						Tax	50,120.20	50,565.73	445.53		
Public Notes:						**LL**	0.00	222.77	222.77		
						INT	0.00	0.00	0.00		
						Tax TTL	50,120.20	50,788.50	668.30	0.00	
2025002232	410590	PP	2020	HARRIS TEETER LLC 7350	5/26/2026	**Value**	4,891,252	4,934,370	43,118		TMA AUDIT DISCOVERY
						Tax	65,894.95	66,475.83	580.88		
Public Notes:						**LL**	0.00	348.53	348.53		
						INT	0.00	0.00	0.00		
						Tax TTL	65,894.95	66,824.36	929.41	0.00	
2025002207	411699	PP	2025	LATIN CREDIT UNION	5/13/2026	**Value**	435,552	437,100	1,548		TMA AUDIT DISCOVERY
						Tax	3,807.60	3,821.13	13.53		
Public Notes:						**LL**	380.76	382.11	1.35		
						INT	0.00	0.00	0.00		
						Tax TTL	4,188.36	4,203.24	14.88	0.00	

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2025002207	411699	PP	2024	LATIN CREDIT UNION	5/13/2026	**Value**	466,288	467,836	1,548		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	5,084.87	5,101.75	16.88		
						LL	0.00	3.38	3.38		
						INT	0.00	0.00	0.00		
						Tax TTL	5,084.87	5,105.13	20.26	0.00	
2025002207	411699	PP	2023	LATIN CREDIT UNION	5/13/2026	**Value**	496,557	498,105	1,548		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	5,414.95	5,431.84	16.89		
						LL	0.00	5.06	5.06		
						INT	0.00	0.00	0.00		
						Tax TTL	5,414.95	5,436.90	21.95	0.00	
2025002207	411699	PP	2022	LATIN CREDIT UNION	5/13/2026	**Value**	547,614	561,117	13,503		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	5,971.73	6,118.98	147.25		
						LL	0.00	58.90	58.90		
						INT	0.00	0.00	0.00		
						Tax TTL	5,971.73	6,177.88	206.15	0.00	
2025002207	411699	PP	2021	LATIN CREDIT UNION	5/13/2026	**Value**	619,718	621,266	1,548		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	6,758.02	6,774.91	16.89		
						LL	0.00	8.44	8.44		
						INT	0.00	0.00	0.00		
						Tax TTL	6,758.02	6,783.35	25.33	0.00	
2025002207	411699	PP	2020	LATIN CREDIT UNION	5/13/2026	**Value**	52,184	57,630	5,446		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	703.02	776.39	73.37		
						LL	0.00	44.02	44.02		
						INT	0.00	0.00	0.00		
						Tax TTL	703.02	820.41	117.39	0.00	
2025002197	412664	PP	2025	MULLIS MECHANICAL INC.	5/11/2026	**Value**	211,563	358,837	147,274		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,011.69	1,715.96	704.27		
						LL	0.00	140.85	140.85		
						INT	0.00	0.00	0.00		
						Tax TTL	1,011.69	1,856.81	845.12	0.00	

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2025002197	412664	PP	2024	MULLIS MECHANICAL INC.	5/11/2026	**Value**	240,901	304,910	64,009		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,538.88	1,947.77	408.89		
						LL	0.00	122.67	122.67		
						INT	0.00	0.00	0.00		
						Tax TTL	1,538.88	2,070.44	531.56	0.00	
2025002197	412664	PP	2023	MULLIS MECHANICAL INC.	5/11/2026	**Value**	279,644	387,670	108,026		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,741.62	2,414.41	672.79		
						LL	174.16	443.29	269.13		
						INT	0.00	0.00	0.00		
						Tax TTL	1,915.78	2,857.70	941.92	0.00	
2025002197	412664	PP	2022	MULLIS MECHANICAL INC.	5/11/2026	**Value**	327,976	440,763	112,787		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,042.63	2,745.07	702.44		
						LL	204.26	555.50	351.24		
						INT	0.00	0.00	0.00		
						Tax TTL	2,246.89	3,300.57	1,053.68	0.00	
2025002197	412664	PP	2021	MULLIS MECHANICAL INC.	5/11/2026	**Value**	263,776	388,667	124,891		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,671.02	2,462.21	791.19		
						LL	0.00	474.71	474.71		
						INT	0.00	0.00	0.00		
						Tax TTL	1,671.02	2,936.92	1,265.90	0.00	
2025002241	413045	PP	2025	ORNAMENTAL FENCE SOLUTIONS	5/28/2026	**Value**	41,777	148,417	106,640		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	365.21	1,297.46	932.25		
						LL	36.52	222.97	186.45		
						INT	0.00	0.00	0.00		
						Tax TTL	401.73	1,520.43	1,118.70	0.00	
2025002241	413045	PP	2024	ORNAMENTAL FENCE SOLUTIONS	5/28/2026	**Value**	46,061	163,723	117,662		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	502.30	1,785.40	1,283.10		
						LL	50.23	435.16	384.93		
						INT	0.00	0.00	0.00		
						Tax TTL	552.53	2,220.56	1,668.03	0.00	

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2025002241	413045	PP	2023	ORNAMENTAL FENCE SOLUTIONS	5/28/2026	**Value**	53,767	67,435	13,668		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	586.33	735.38	149.05		
						LL	0.00	59.62	59.62		
						INT	0.00	0.00	0.00		
						Tax TTL	586.33	795.00	208.67	0.00	
2025002241	413045	PP	2022	ORNAMENTAL FENCE SOLUTIONS	5/28/2026	**Value**	40,123	43,782	3,659		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	437.54	477.44	39.90		
						LL	43.75	63.71	19.96		
						INT	0.00	0.00	0.00		
						Tax TTL	481.29	541.15	59.86	0.00	
2025002241	413045	PP	2021	ORNAMENTAL FENCE SOLUTIONS	5/28/2026	**Value**	42,603	46,670	4,067		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	464.59	508.94	44.35		
						LL	0.00	26.61	26.61		
						INT	0.00	0.00	0.00		
						Tax TTL	464.59	535.55	70.96	0.00	
2025002159	413930	PP	2025	RICHEY, RODNEY KEITH	5/1/2026	**Value**	56,704	74,704	18,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	288.17	379.65	91.48		
						LL	28.82	37.95	9.13		
						INT	0.00	0.00	0.00		
						Tax TTL	316.99	417.60	100.61	0.00	
2025002190	414167	PP	2025	S & S RETAINING WALLS INC	5/8/2026	**Value**	174,480	176,346	1,866		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	837.85	846.81	8.96		
						LL	0.00	1.79	1.79		
						INT	0.00	0.00	0.00		
						Tax TTL	837.85	848.60	10.75	0.00	
2025002190	414167	PP	2024	S & S RETAINING WALLS INC	5/8/2026	**Value**	115,586	117,417	1,831		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	740.10	751.82	11.72		
						LL	0.00	3.52	3.52		
						INT	0.00	0.00	0.00		
						Tax TTL	740.10	755.34	15.24	0.00	

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2025002190	414167	PP	2023	S & S RETAINING WALLS INC	5/8/2026	**Value**	132,603	134,968	2,365		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	835.27	850.16	14.89		
						LL	0.00	5.96	5.96		
						INT	0.00	0.00	0.00		
						Tax TTL	835.27	856.12	20.85	0.00	
2025002190	414167	PP	2022	S & S RETAINING WALLS INC	5/8/2026	**Value**	142,813	145,493	2,680		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	899.58	916.46	16.88		
						LL	0.00	8.44	8.44		
						INT	0.00	0.00	0.00		
						Tax TTL	899.58	924.90	25.32	0.00	
2025002190	414167	PP	2021	S & S RETAINING WALLS INC	5/8/2026	**Value**	134,048	137,104	3,056		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	842.22	861.42	19.20		
						LL	0.00	11.52	11.52		
						INT	0.00	0.00	0.00		
						Tax TTL	842.22	872.94	30.72	0.00	
2025002206	415059	PP	2024	THE CORNWELL COMPANY INC	5/13/2026	**Value**	283,844	288,447	4,603		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,427.43	2,466.80	39.37		
						LL	0.00	11.81	11.81		
						INT	0.00	0.00	0.00		
						Tax TTL	2,427.43	2,478.61	51.18	0.00	
2025002194	415993	PP	2025	BLACKWOOD, AUDREY	5/8/2026	**Value**	265,481	273,377	7,896		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,326.34	1,365.79	39.45		
						LL	0.00	7.89	7.89		
						INT	0.00	0.00	0.00		
						Tax TTL	1,326.34	1,373.68	47.34	0.00	
2025002194	415993	PP	2024	BLACKWOOD, AUDREY	5/8/2026	**Value**	75,081	83,394	8,313		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	490.13	544.40	54.27		
						LL	0.00	16.28	16.28		
						INT	0.00	0.00	0.00		
						Tax TTL	490.13	560.68	70.55	0.00	

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2025002194	415993	PP	2023	BLACKWOOD, AUDREY	5/8/2026	**Value**	75,081	83,852	8,771		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	475.26	530.78	55.52		
						LL	47.53	69.73	22.20		
						INT	0.00	0.00	0.00		
						Tax TTL	522.79	600.51	77.72	0.00	
2025002194	415993	PP	2022	BLACKWOOD, AUDREY	5/8/2026	**Value**	75,081	83,907	8,826		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	477.52	533.65	56.13		
						LL	0.00	28.07	28.07		
						INT	0.00	0.00	0.00		
						Tax TTL	477.52	561.72	84.20	0.00	
2025002194	415993	PP	2021	BLACKWOOD, AUDREY	5/8/2026	**Value**	75,081	78,912	3,831		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	477.52	501.88	24.36		
						LL	0.00	14.62	14.62		
						INT	0.00	0.00	0.00		
						Tax TTL	477.52	516.50	38.98	0.00	
2025002210	584485	PP	2025	SOUTHERN ROOTS BAR & GRILL	5/13/2026	**Value**	20,400	25,500	5,100		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	178.34	222.92	44.58		
						LL	17.83	26.75	8.92		
						INT	0.00	0.00	0.00		
						Tax TTL	196.17	249.67	53.50	0.00	
2025002235	584485	PP	2025	SOUTHERN ROOTS BAR & GRILL	5/27/2026	**Value**	25,500	45,500	20,000		BUSINESS CLOSED
Public Notes:						**Tax**	222.92	397.76	174.84		
						LL	26.75	26.75	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	249.67	424.51	174.84	0.00	
2025002210	584485	PP	2024	SOUTHERN ROOTS BAR & GRILL	5/13/2026	**Value**	25,200	31,500	6,300		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	274.81	343.51	68.70		
						LL	27.48	48.09	20.61		
						INT	0.00	0.00	0.00		
						Tax TTL	302.29	391.60	89.31	0.00	

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2025002210	584485	PP	2023	SOUTHERN ROOTS BAR & GRILL	5/13/2026	**Value**	29,600	37,000	7,400		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	322.79	403.49	80.70		
						LL	32.28	64.56	32.28		
						INT	0.00	0.00	0.00		
						Tax TTL	355.07	468.05	112.98	0.00	
2025002210	584485	PP	2022	SOUTHERN ROOTS BAR & GRILL	5/13/2026	**Value**	30,400	38,000	7,600		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	331.51	414.39	82.88		
						LL	0.00	41.44	41.44		
						INT	0.00	0.00	0.00		
						Tax TTL	331.51	455.83	124.32	0.00	
2025002210	584485	PP	2021	SOUTHERN ROOTS BAR & GRILL	5/13/2026	**Value**	32,800	41,000	8,200		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	357.68	447.11	89.43		
						LL	0.00	53.65	53.65		
						INT	0.00	0.00	0.00		
						Tax TTL	357.68	500.76	143.08	0.00	
2025002208	599878	PP	2021	KEFI WINERY INC	5/13/2026	**Value**	13,617	47,553	33,936		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	83.00	289.84	206.84		
						LL	8.30	132.40	124.10		
						INT	0.00	0.00	0.00		
						Tax TTL	91.30	422.24	330.94	0.00	
2025002186	615701	PP	2025	RAINIER LAWN CARE LLC	5/8/2026	**Value**	27,589	31,797	4,208		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	140.21	161.59	21.38		
						LL	14.02	18.30	4.28		
						INT	0.00	0.00	0.00		
						Tax TTL	154.23	179.89	25.66	0.00	
2025002186	615701	PP	2024	RAINIER LAWN CARE LLC	5/8/2026	**Value**	32,388	37,611	5,223		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	218.85	254.14	35.29		
						LL	21.89	32.48	10.59		
						INT	0.00	0.00	0.00		
						Tax TTL	240.74	286.62	45.88	0.00	

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2025002187	615701	PP	2023	RAINIER LAWN CARE LLC	5/8/2026	**Value**	35,630	41,904	6,274		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	227.43	267.47	40.04		
						LL	22.74	38.76	16.02		
						INT	0.00	0.00	0.00		
						Tax TTL	250.17	306.23	56.06	0.00	
2025002188	615701	PP	2022	RAINIER LAWN CARE LLC	5/8/2026	**Value**	36,908	43,465	6,557		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	297.96	350.89	52.93		
						LL	29.80	56.27	26.47		
						INT	0.00	0.00	0.00		
						Tax TTL	327.76	407.16	79.40	0.00	
2025002183	621997	PP	2025	MODERN SITE LLC	5/6/2026	**Value**	53,285	755,749	702,464		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	277.56	3,936.70	3,659.14		
						LL	27.76	759.59	731.83		
						INT	0.00	0.00	0.00		
						Tax TTL	305.32	4,696.29	4,390.97	0.00	
2025002183	621997	PP	2024	MODERN SITE LLC	5/6/2026	**Value**	17,942	834,339	816,397		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	126.99	5,905.45	5,778.46		
						LL	12.70	1,746.24	1,733.54		
						INT	0.00	0.00	0.00		
						Tax TTL	139.69	7,651.69	7,512.00	0.00	
2025002183	621997	PP	2023	MODERN SITE LLC	5/6/2026	**Value**	18,887	454,399	435,512		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	129.47	3,114.91	2,985.44		
						LL	12.95	1,207.12	1,194.17		
						INT	0.00	0.00	0.00		
						Tax TTL	142.42	4,322.03	4,179.61	0.00	
2025002183	621997	PP	2022	MODERN SITE LLC	5/6/2026	**Value**	9,450	100,145	90,695		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	64.78	686.49	621.71		
						LL	6.48	317.34	310.86		
						INT	0.00	0.00	0.00		
						Tax TTL	71.26	1,003.83	932.57	0.00	

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2025002184	631419	PP	2025	VING IT LLC	5/7/2026	**Value**	139,387	266,162	126,775		BUSINESS CLOSED
Public Notes:						**Tax**	911.31	1,740.17	828.86		
						LL	91.13	174.03	82.90		
						INT	0.00	0.00	0.00		
						Tax TTL	1,002.44	1,914.20	911.76	0.00	
2025002166	657820	PP	2024	HAMPTON COLLECTIVE LLC	5/5/2026	**Value**	0	5,000	5,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	51.27	51.27		
						LL	0.00	10.25	10.25		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	61.52	61.52	0.00	
2025002166	657820	PP	2023	HAMPTON COLLECTIVE LLC	5/5/2026	**Value**	0	5,000	5,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	50.75	50.75		
						LL	0.00	15.23	15.23		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	65.98	65.98	0.00	
2025002166	657820	PP	2022	HAMPTON COLLECTIVE LLC	5/5/2026	**Value**	0	5,000	5,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	50.75	50.75		
						LL	0.00	20.30	20.30		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	71.05	71.05	0.00	
2025002166	657820	PP	2021	HAMPTON COLLECTIVE LLC	5/5/2026	**Value**	0	5,000	5,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	50.67	50.67		
						LL	0.00	25.34	25.34		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	76.01	76.01	0.00	
2025002166	657820	PP	2020	HAMPTON COLLECTIVE LLC	5/5/2026	**Value**	0	5,000	5,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	58.43	58.43		
						LL	0.00	35.06	35.06		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	93.49	93.49	0.00	

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2025002191	657826	PP	2024	MONA HAUS & HOME	5/8/2026	**Value**	0	5,000	5,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	51.27	51.27		
						LL	0.00	10.25	10.25		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	61.52	61.52	0.00	
2025002191	657826	PP	2023	MONA HAUS & HOME	5/8/2026	**Value**	0	5,000	5,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	50.75	50.75		
						LL	0.00	15.23	15.23		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	65.98	65.98	0.00	
2025002191	657826	PP	2022	MONA HAUS & HOME	5/8/2026	**Value**	0	5,000	5,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	50.75	50.75		
						LL	0.00	20.30	20.30		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	71.05	71.05	0.00	
2025002191	657826	PP	2021	MONA HAUS & HOME	5/8/2026	**Value**	0	5,000	5,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	50.67	50.67		
						LL	0.00	25.34	25.34		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	76.01	76.01	0.00	
2025002191	657826	PP	2020	MONA HAUS & HOME	5/8/2026	**Value**	0	5,000	5,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	58.43	58.43		
						LL	0.00	35.06	35.06		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	93.49	93.49	0.00	
2025002182	657910	PP	2024	POWERHOUSE KARATE LLC	5/6/2026	**Value**	0	20,440	20,440		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	209.57	209.57		
						LL	0.00	41.91	41.91		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	251.48	251.48	0.00	

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2025002182	657910	PP	2023	POWERHOUSE KARATE LLC	5/6/2026	**Value**	0	20,440	20,440		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	207.45	207.45		
						LL	0.00	62.24	62.24		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	269.69	269.69	0.00	
2025002161	658171	PP	2024	MIMIK TATTOO NC LLC	5/1/2026	**Value**	0	13,600	13,600		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	113.80	113.80		
						LL	0.00	22.76	22.76		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	136.56	136.56	0.00	
2025002185	658172	PP	2024	ROAR TAEKWONDO LLC	5/7/2026	**Value**	0	20,440	20,440		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	171.04	171.04		
						LL	0.00	34.21	34.21		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	205.25	205.25	0.00	
2025002185	658172	PP	2023	ROAR TAEKWONDO LLC	5/7/2026	**Value**	0	20,440	20,440		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	168.67	168.67		
						LL	0.00	50.60	50.60		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	219.27	219.27	0.00	
2025002185	658172	PP	2022	ROAR TAEKWONDO LLC	5/7/2026	**Value**	0	20,440	20,440		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	165.01	165.01		
						LL	0.00	66.00	66.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	231.01	231.01	0.00	
2025002185	658172	PP	2021	ROAR TAEKWONDO LLC	5/7/2026	**Value**	0	20,440	20,440		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	164.85	164.85		
						LL	0.00	82.43	82.43		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	247.28	247.28	0.00	

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2025002185	658172	PP	2020	ROAR TAEKWONDO LLC	5/7/2026	**Value**	0	20,440	20,440		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	198.06	198.06		
						LL	0.00	118.84	118.84		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	316.90	316.90	0.00	
2025002200	676133	PP	2025	CEM HOLDINGS CORPORATION	5/11/2026	**Value**	0	39,989	39,989		COUNTY TRANSFER
Public Notes:						**Tax**	0.00	267.69	267.69		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	267.69	267.69	0.00	
2025002202	676134	PP	2025	CEM HOLDINGS CORPORATION	5/11/2026	**Value**	0	36,384	36,384		COUNTY TRANSFER
Public Notes:						**Tax**	0.00	243.55	243.55		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	243.55	243.55	0.00	
2025002201	676135	PP	2025	CEM HOLDINGS CORPORATION	5/11/2026	**Value**	0	30,323	30,323		COUNTY TRANSFER
Public Notes:						**Tax**	0.00	202.98	202.98		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	202.98	202.98	0.00	
2025002225	676762	PP	2025	STURDIVANT, RATONYA LAREKA	5/22/2026	**Value**	0	14,330	14,330		GAP BILL
Public Notes:						**Tax**	0.00	139.17	139.17		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	139.17	139.17	0.00	
2025002224	676763	PP	2025	MENDOZA, KARINA CINDIA	5/22/2026	**Value**	0	2,192	2,192		GAP BILL
Public Notes:						**Tax**	0.00	14.33	14.33		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	14.33	14.33	0.00	

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2025002226	676764	PP	2025	SOLIS GARCIA, BERENICE	5/22/2026	**Value**	0	2,283	2,283		GAP BILL
Public Notes:						**Tax**	0.00	22.17	22.17		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	22.17	22.17	0.00	
2025002223	676765	PP	2025	RIEKE, PETER WILLIAM STRAU	5/22/2026	**Value**	0	6,045	6,045		GAP BILL
Public Notes:						**Tax**	0.00	39.52	39.52		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	39.52	39.52	0.00	
2025002217	676766	PP	2025	INGRAM, PHILANDER	5/15/2026	**Value**	0	13,608	13,608		GAP BILL
Public Notes:						**Tax**	0.00	67.99	67.99		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	67.99	67.99	0.00	
				Totals for Type Value Change - Discovery :		**Value**	**61,446,527**	**65,539,191**	**4,092,664**		
						Tax	**581,428.52**	**610,371.89**	**28,943.37**		
						LL	**3,691.05**	**12,827.57**	**9,136.52**		
						INT	**0.00**	**0.00**	**0.00**		
						Tax TTL	**585,119.57**	**623,199.46**	**38,079.89**	**0.00**	

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2025002221	07058412	RE	2025	KLINGLER, SARAH M & KLINGLER, JASON T	5/20/2026	**Value**	644,600	600,000	(44,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,169.92	3,881.40	(288.52)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,169.92	3,881.40	(288.52)	212.70	
2025002230	407339	PP	2025	AUTOTRAIN LLC	5/26/2026	**Value**	23,028	0	(23,028)		TAXPAYER MOVED
						Tax	150.56	0.00	(150.56)		
Public Notes:						**LL**	15.06	0.00	(15.06)		
						INT	0.00	0.00	0.00		
						Tax TTL	165.62	0.00	(165.62)	0.00	
2025002169	416232	PP	2025	WORLD WIDE MOTORS INC	5/5/2026	**Value**	2,825	0	(2,825)		BUSINESS CLOSED
						Tax	18.91	0.00	(18.91)		
Public Notes:						**LL**	1.89	0.00	(1.89)		
						INT	0.00	0.00	0.00		
						Tax TTL	20.80	0.00	(20.80)	0.00	
2025002179	577891	PP	2025	NIETO, MARIA MAGDALENA RAM	5/6/2026	**Value**	14,460	0	(14,460)		SOLD PP ASSET
						Tax	68.96	0.00	(68.96)		
Public Notes:						**LL**	6.90	0.00	(6.90)		
						INT	0.00	0.00	0.00		
						Tax TTL	75.86	0.00	(75.86)	0.00	
2025002179	577891	PP	2024	NIETO, MARIA MAGDALENA RAM	5/6/2026	**Value**	5,512	0	(5,512)		SOLD PP ASSET
						Tax	35.23	0.00	(35.23)		
Public Notes:						**LL**	3.52	0.00	(3.52)		
						INT	0.00	0.00	0.00		
						Tax TTL	38.75	0.00	(38.75)	0.00	
2025002179	577891	PP	2023	NIETO, MARIA MAGDALENA RAM	5/6/2026	**Value**	5,512	0	(5,512)		SOLD PP ASSET
						Tax	34.84	0.00	(34.84)		
Public Notes:						**LL**	3.48	0.00	(3.48)		
						INT	0.00	0.00	0.00		
						Tax TTL	38.32	0.00	(38.32)	0.00	

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2025002238	578695	PP	2025	BETTER TRUCKING RESOURCES	5/27/2026	**Value**	74,121	44,669	(29,452)		SOLD PP ASSET
Public Notes:						**Tax**	647.97	390.50	(257.47)		
						LL	64.80	39.05	(25.75)		
						INT	0.00	0.00	0.00		
						Tax TTL	712.77	429.55	(283.22)	0.00	
2025002193	601821	PP	2025	INTERSTATE TRANSPORT LLC	5/8/2026	**Value**	23,308	17,403	(5,905)		SOLD PP ASSET
Public Notes:						**Tax**	203.76	152.14	(51.62)		
						LL	20.38	15.21	(5.17)		
						INT	0.00	0.00	0.00		
						Tax TTL	224.14	167.35	(56.79)	0.00	
2025002193	601821	PP	2024	INTERSTATE TRANSPORT LLC	5/8/2026	**Value**	25,786	19,225	(6,561)		SOLD PP ASSET
Public Notes:						**Tax**	281.20	209.65	(71.55)		
						LL	28.12	20.96	(7.16)		
						INT	0.00	0.00	0.00		
						Tax TTL	309.32	230.61	(78.71)	0.00	
2025002227	620694	PP	2025	TRAVELIN LIGHT TRUCKIN LLC	5/22/2026	**Value**	36,086	0	(36,086)		SOLD PP ASSET
Public Notes:						**Tax**	315.46	0.00	(315.46)		
						LL	31.55	0.00	(31.55)		
						INT	0.00	0.00	0.00		
						Tax TTL	347.01	0.00	(347.01)	0.00	
2025002203	621310	PP	2025	BECHT, ANTOINETTE JOSEPHIN	5/12/2026	**Value**	4,413	0	(4,413)		SOLD PP ASSET
Public Notes:						**Tax**	22.33	0.00	(22.33)		
						LL	2.23	0.00	(2.23)		
						INT	0.00	0.00	0.00		
						Tax TTL	24.56	0.00	(24.56)	0.00	
2025002215	625387	PP	2025	FLASH MARKET LLC FLASH MAR	5/15/2026	**Value**	32,781	0	(32,781)		DUPLICATE ASSESSMENT
Public Notes:						**Tax**	247.86	0.00	(247.86)		
						LL	24.79	0.00	(24.79)		
						INT	0.00	0.00	0.00		
						Tax TTL	272.65	0.00	(272.65)	0.00	

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2025002175	644773	PP	2025	CANAAN LOGISTIC INC	5/6/2026	**Value**	27,058	0	(27,058)		SOLD PP ASSET
Public Notes:						**Tax**	181.13	0.00	(181.13)		
						LL	18.11	0.00	(18.11)		
						INT	0.00	0.00	0.00		
						Tax TTL	199.24	0.00	(199.24)	0.00	
2025002216	644813	PP	2025	SELLS ENTERPRISES LLC	5/15/2026	**Value**	4,513	0	(4,513)		SOLD PP ASSET
Public Notes:						**Tax**	39.45	0.00	(39.45)		
						LL	3.95	0.00	(3.95)		
						INT	0.00	0.00	0.00		
						Tax TTL	43.40	0.00	(43.40)	0.00	
2025002229	657740	PP	2025	HELMS, JONATHAN EVAN & KISER, HAILEY BRIANNE	5/26/2026	**Value**	8,313	0	(8,313)		SOLD PP ASSET
						Tax	41.47	0.00	(41.47)		
Public Notes:						**LL**	4.15	0.00	(4.15)		
						INT	0.00	0.00	0.00		
						Tax TTL	45.62	0.00	(45.62)	0.00	
2025002231	658080	PP	2025	DEESE EXPRESS INC	5/26/2026	**Value**	7,200	0	(7,200)		SOLD PP ASSET
Public Notes:						**Tax**	69.93	0.00	(69.93)		
						LL	6.99	0.00	(6.99)		
						INT	0.00	0.00	0.00		
						Tax TTL	76.92	0.00	(76.92)	0.00	
2025002239	658719	PP	2025	GOMEZ, ESMERALDA MARTINEZ	5/27/2026	**Value**	18,069	0	(18,069)		CLERICAL ERROR
Public Notes:						**Tax**	91.45	0.00	(91.45)		
						LL	9.15	0.00	(9.15)		
						INT	0.00	0.00	0.00		
						Tax TTL	100.60	0.00	(100.60)	0.00	
2025002204	659090	PP	2025	GPM EMPIRE LLC	5/12/2026	**Value**	7,517	0	(7,517)		DUPLICATE ASSESSMENT
Public Notes:						**Tax**	56.84	0.00	(56.84)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	56.84	0.00	(56.84)	0.00	

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2025002176	663775	PP	2024	FELTON, SONYA RENEE	5/6/2026	**Value**	41,201	0	(41,201)		TAXPAYER MOVED
Public Notes:						**Tax**	449.30	0.00	(449.30)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	449.30	0.00	(449.30)	0.00	
2025002213	665436	PP	2024	TAYLOR, VINCENT VERN	5/15/2026	**Value**	22,023	14,363	(7,660)		TAXPAYER MOVED
Public Notes:						**Tax**	225.80	147.26	(78.54)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	225.80	147.26	(78.54)	0.00	
2025002174	665625	PP	2024	HERMAN, JOSHUA THOMAS	5/6/2026	**Value**	12,500	0	(12,500)		TAXPAYER MOVED
Public Notes:						**Tax**	103.31	0.00	(103.31)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	103.31	0.00	(103.31)	0.00	
2025002234	665852	PP	2024	KARPETS, VASILIY L'VOVICH	5/26/2026	**Value**	2,088	0	(2,088)		DUPLICATE ASSESSMENT
Public Notes:						**Tax**	14.06	0.00	(14.06)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	14.06	0.00	(14.06)	0.00	
2025002177	666659	PP	2024	RUBIN, ANDREW SCOTT	5/6/2026	**Value**	100,153	6,195	(93,958)		TAXPAYER MOVED
Public Notes:						**Tax**	628.76	38.89	(589.87)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	628.76	38.89	(589.87)	0.00	
2025002173	666737	PP	2024	HERMAN, ASHLEY ELIZABETH	5/6/2026	**Value**	25,925	4,575	(21,350)		TAXPAYER MOVED
Public Notes:						**Tax**	214.27	37.81	(176.46)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	214.27	37.81	(176.46)	0.00	

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2025002212	667803	PP	2024	FORD, GREGORY ALAN	5/15/2026	**Value**	46,707	30,887	(15,820)		TAXPAYER MOVED
						Tax	386.03	255.28	(130.75)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	386.03	255.28	(130.75)	0.00	
2025002246	667803	PP	2024	FORD, GREGORY ALAN	5/29/2026	**Value**	30,887	0	(30,887)		TAXPAYER MOVED
						Tax	255.28	0.00	(255.28)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	255.28	0.00	(255.28)	0.00	
2025002170	668448	PP	2024	PROSSER, AMANDA LYNN	5/5/2026	**Value**	53,900	0	(53,900)		TAXPAYER MOVED
						Tax	587.78	0.00	(587.78)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	587.78	0.00	(587.78)	0.00	
2025002196	670704	PP	2025	VARIE, LINDA DARLENE & VARIE, JOSEPH MARC	5/11/2026	**Value**	103,802	0	(103,802)		TAXPAYER MOVED
						Tax	499.91	0.00	(499.91)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	499.91	0.00	(499.91)	0.00	
2025002195	670705	PP	2025	VARIE, JOSEPH MARC	5/11/2026	**Value**	87,520	0	(87,520)		TAXPAYER MOVED
						Tax	421.50	0.00	(421.50)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	421.50	0.00	(421.50)	0.00	
2025002244	672583	PP	2025	SWINK, BRITTANY NOELLE	5/29/2026	**Value**	28,680	0	(28,680)		TAXPAYER MOVED
						Tax	250.72	0.00	(250.72)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	250.72	0.00	(250.72)	0.00	

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Correction Listing Report

Union County

Date Posted between 5/1/2026 and 5/31/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002214	675341	PP	2025	PEREZ, CLAUDIA MARCELA	5/15/2026	**Value**	15,105	0	(15,105)		TAXPAYER MOVED
Public Notes:						**Tax**	116.34	0.00	(116.34)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	116.34	0.00	(116.34)	0.00	
2025002171	675436	PP	2025	ARP, LARRY DEAN JR	5/5/2026	**Value**	2,038	0	(2,038)		CLERICAL ERROR
Public Notes:						**Tax**	10.36	0.00	(10.36)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	10.36	0.00	(10.36)	0.00	
2025002181	675841	PP	2025	CORNELISON, CAROLYN JANE	5/6/2026	**Value**	144,055	0	(144,055)		TAXPAYER MOVED
Public Notes:						**Tax**	669.28	0.00	(669.28)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	669.28	0.00	(669.28)	0.00	
2025002243	676207	PP	2025	PAUL, DAVID ALLAN	5/29/2026	**Value**	178,688	0	(178,688)		TAXPAYER MOVED
Public Notes:						**Tax**	1,562.09	0.00	(1,562.09)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,562.09	0.00	(1,562.09)	0.00	
2025002236	676249	PP	2025	COWARD, STEPHEN DONALD	5/27/2026	**Value**	34,271	0	(34,271)		TAXPAYER MOVED
Public Notes:						**Tax**	159.22	0.00	(159.22)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	159.22	0.00	(159.22)	0.00	
2025002237	676476	PP	2025	GAMPA, ROHIT	5/27/2026	**Value**	75,620	0	(75,620)		TAXPAYER MOVED
Public Notes:						**Tax**	582.43	0.00	(582.43)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	582.43	0.00	(582.43)	0.00	

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Correction Listing Report

Union County

Date Posted between 5/1/2026 and 5/31/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002245	677520	PP	2025	SMITH, ERICA DANIELLE	5/29/2026	Value	55,219	0	(55,219)		TAXPAYER MOVED
						Tax	357.21	0.00	(357.21)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	357.21	0.00	(357.21)	0.00	
				Totals for Type Value Change - Release :		**Value**	**2,025,484**	**737,317**	**(1,288,167)**		
						Tax	**14,170.92**	**5,112.93**	**(9,057.99)**		
						LL	**245.07**	**75.22**	**(169.85)**		
						INT	**0.00**	**0.00**	**0.00**		
						Tax TTL	**14,415.99**	**5,188.15**	**(9,227.84)**	**212.70**	

Grand Totals :

Year	Refund Amount
	212.70

Value	**72,989,790**	**98,008,538**	**25,018,748**	
Tax	**652,867.83**	**841,243.73**	**188,375.90**	
LL	**3,936.12**	**12,902.79**	**8,966.67**	
INT	**0.00**	**21,985.10**	**21,985.10**	
Tax TTL	**656,803.95**	**876,131.62**	**219,327.67**	**212.70**

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File #: 26-367 **Agenda Date:** 7/20/2026

TITLE:

May 2026 NCVTS Motor Vehicle Tax Report

INFORMATION CONTACT:

Vann Harrell, Tax Administration, Tax Administrator, 704-283-3748; Kristen Foxworth, Tax Administration, Deputy Tax Administrator, 704-283-3591

ACTION REQUESTED:

Approve the May 2026 NCVTS Motor Vehicle Tax Refund Report.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

$3,439.84

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
CHILIAN, JESSICA MARIE	CHILIAN, JESSICA MARIE		206 ELVEN CT		MARVIN, NC 28173	Adjustment >= $100	0090488199	MCH6853	PENDING	989584752	Refund Generated due to adjustment on Bill #0090488199-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($534.36)	$0.00	($534.36)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															026	TAX	$36.92	$0.00	$36.92
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$527.44
COOK UNDERGROUND CONTRACTING LLC	COOK UNDERGROUND CONTRACTING LLC		6417 MCWHORTER RD		WAXHAW, NC 28173	Adjustment >= $100	0091197477	AA3411E	PENDING	991168496	Refund Generated due to adjustment on Bill #0091197477-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($366.93)	$0.00	($366.93)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															025	TAX	$37.19	$0.00	$37.19
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$359.74
GRIMES, REGINA AKOSUA	GRIMES, REGINA AKOSUA		1618 WAXHAW INDIAN TRAIL RD		WAXHAW, NC 28173	Adjustment >= $100	0091069011	TKT2533	PENDING	991167560	Refund Generated due to adjustment on Bill #0091069011-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($82.54)	$0.00	($82.54)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															026	TAX	$5.70	$0.00	$5.70
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$106.84
GROUND 40 MINISTRIES	GROUND 40 MINISTRIES		303 DALE ST		MONROE, NC 28112	Adjustment >= $100	0090502589	WBD7241	PENDING	868636090	Refund Generated due to adjustment on Bill #0090502589-2025-2025-0000-00	Exempt Property	5/28/2026		001	TAX	($19.42)	$0.00	($19.42)
															200	TAX	($76.03)	$0.00	($76.03)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															003	TAX	($1.83)	$0.00	($1.83)
															005	TAX	($0.78)	$0.00	($0.78)
															004	TAX	($6.72)	$0.00	($6.72)
															002	TAX	($46.28)	$0.00	($46.28)
																		Refund	$181.06
HAMANN, RICHARD ANTHONY	HAMANN, RICHARD ANTHONY		443 WALDEN TRL		WAXHAW, NC 28173	Adjustment >= $100	0090942295	87402	PENDING	864084991	Refund Generated due to adjustment on Bill #0090942295-2025-2025-0000-00	Exempt Property	5/4/2026		001	TAX	($141.66)	$0.00	($141.66)
															800	TAX	($44.11)	$0.00	($44.11)
															026	TAX	($38.32)	$0.00	($38.32)
															003	TAX	($13.36)	$0.00	($13.36)
															005	TAX	($5.67)	$0.00	($5.67)
															004	TAX	($49.03)	$0.00	($49.03)
															002	TAX	($337.52)	$0.00	($337.52)
																		Refund	$629.67
KIRCHNER, STEVEN CARL	KIRCHNER, STEVEN CARL		1051 SEVEN SISTERS AVE		MONROE, NC 28110	Adjustment >= $100	0091094767	MCN6049	PENDING	991168456	Refund Generated due to adjustment on Bill #0091094767-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($220.44)	$0.00	($220.44)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															015	TAX	$23.75	$0.00	$23.75
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$226.69
MCGRAW DOOR LLC	MCGRAW DOOR LLC		5318 SUITE B LANCASTER HW		MONROE, NC 28112	Adjustment >= $100	0091028557	MBV6136	PENDING	991167648	Refund Generated due to adjustment on Bill #0091028557-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($117.08)	$0.00	($117.08)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															015	TAX	$12.61	$0.00	$12.61
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$134.47
MIKELINICH, MARIO BRANKO	MIKELINICH, MARIO BRANKO		314 ROYAL CRESCENT LN		MARVIN, NC 28173	Adjustment >= $100	0091143479	MCC4031	PENDING	991168472	Refund Generated due to adjustment on Bill #0091143479-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($363.00)	$0.00	($363.00)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															026	TAX	$25.08	$0.00	$25.08
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$367.92

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
QUISPE ANDIA, FRANK ALAIN	QUISPE ANDIA, FRANK ALAIN		6101 FOLLOW THE TRAIL		INDIAN TRAIL, NC 28079	Adjustment >= $100	0091196420	MCR5377	PENDING	1115064261	Refund Generated due to adjustment on Bill #0091196420-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$65.96	$0.00	$65.96
															200	TAX	($170.72)	$0.00	($170.72)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															023	TAX	$16.57	$0.00	$16.57
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$118.19
RAMIREZ CRAVIOTO, ABNER ELEONAI	RAMIREZ CRAVIOTO, ABNER ELEONAI		5700 INDIAN TRAIL FAIRVIEW RD		INDIAN TRAIL, NC 28079	Adjustment >= $100	0090498750	MCJ5837	PENDING	989584144	Refund Generated due to adjustment on Bill #0090498750-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($99.31)	$0.00	($99.31)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															023	TAX	$9.64	$0.00	$9.64
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$119.67
SECURE TURF INC	SECURE TURF INC		PO BOX 3180		INDIAN TRAIL, NC 28079	Adjustment >= $100	0090457886	AA8015E	PENDING	989584704	Refund Generated due to adjustment on Bill #0090457886-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($217.58)	$0.00	($217.58)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															021	TAX	$26.70	$0.00	$26.70
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$220.88
SEERING, ALLEE RENEE	SEERING, ALLEE RENEE	SEERING, HALEY MICHELLE	1181 WOODWINDS DR		WAXHAW, NC 28173	Adjustment >= $100	0090554439	VBC7262	PENDING	1113282189	Refund Generated due to adjustment on Bill #0090554439-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($113.04)	$0.00	($113.04)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															970	TAX	$5.78	$0.00	$5.78
															026	TAX	$7.81	$0.00	$7.81
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$129.45
UTILITY LINES CONSTRUCTION SERVICES LLC	UTILITY LINES CONSTRUCTION SERVICES LLC		550 W 36TH ST	TRAIL RD	JASPER, IN 47546	Adjustment >= $100	0091143718	VR1036	PENDING	1115064522	Refund Generated due to adjustment on Bill #0091143718-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$94.61	$0.00	$94.61
															200	TAX	($244.87)	$0.00	($244.87)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															020	TAX	$25.71	$0.00	$25.71
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$154.55
WOYTOWICZ, ROBERT THOMAS	WOYTOWICZ, ROBERT THOMAS		2016 ROSEFIELD CT		INDIAN TRAIL, NC 28079	Adjustment >= $100	0090595588	KHK7228	PENDING	991168224	Refund Generated due to adjustment on Bill #0090595588-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($148.90)	$0.00	($148.90)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															020	TAX	$15.63	$0.00	$15.63
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$163.27
																		Refund Total	$3439.84

Union County, NC

Staff Report

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

File #: 26-409 **Agenda Date:** 7/20/2026

TITLE:

Tax Bill Correction Report for June 2026

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the Tax Bill Correction Reports for June 2026.

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:

June Refund amount = $84,438.46

Correction Listing Report

Union County

Date Posted between 6/1/2026 and 6/30/2026

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002249	01144012B	RE	2025	JERUSALEM PROPERTY LLC	6/3/2026	**Value**	24,700	656,600	631,900		PUV ROLLBACK
						Tax	124.86	3,319.11	3,194.25		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	183.67	183.67		
						Tax TTL	124.86	3,502.78	3,377.92	0.00	
2025002249	01144012B	RE	2024	JERUSALEM PROPERTY LLC	6/3/2026	**Value**	21,800	336,000	314,200		PUV ROLLBACK
						Tax	141.00	2,173.25	2,032.25		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	299.76	299.76		
						Tax TTL	141.00	2,473.01	2,332.01	0.00	
2025002249	01144012B	RE	2023	JERUSALEM PROPERTY LLC	6/3/2026	**Value**	21,800	336,000	314,200		PUV ROLLBACK
						Tax	136.55	2,104.70	1,968.15		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	467.43	467.43		
						Tax TTL	136.55	2,572.13	2,435.58	0.00	
2025002252	01174015A	RE	2025	SMITH, SHARON ANN & SMITH, CRAIG WILLIAM	6/9/2026	**Value**	18,900	669,300	650,400		PUV ROLLBACK
						Tax	95.54	3,383.31	3,287.77		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	189.05	189.05		
						Tax TTL	95.54	3,572.36	3,476.82	0.00	
2025002252	01174015A	RE	2024	SMITH, SHARON ANN & SMITH, CRAIG WILLIAM	6/9/2026	**Value**	18,700	346,200	327,500		PUV ROLLBACK
						Tax	120.95	2,239.22	2,118.27		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	312.45	312.45		
						Tax TTL	120.95	2,551.67	2,430.72	0.00	
2025002252	01174015A	RE	2023	SMITH, SHARON ANN & SMITH, CRAIG WILLIAM	6/9/2026	**Value**	18,700	346,200	327,500		PUV ROLLBACK
						Tax	117.14	2,168.60	2,051.46		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	487.22	487.22		
						Tax TTL	117.14	2,655.82	2,538.68	0.00	

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Correction Listing Report

Union County

Date Posted between 6/1/2026 and 6/30/2026

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002325	02154001	RE	2025	HAIGLER, MICHAEL & LYBRAND, LINDA H	6/29/2026	**Value**	275,600	278,410	2,810		PUV ROLLBACK
						Tax	1,374.70	1,388.72	14.02		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.81	0.81		
						Tax TTL	1,374.70	1,389.53	14.83	0.00	
2025002325	02154001	RE	2024	HAIGLER, MICHAEL & LYBRAND, LINDA H	6/29/2026	**Value**	203,300	204,680	1,380		PUV ROLLBACK
						Tax	1,358.05	1,367.27	9.22		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	1.36	1.36		
						Tax TTL	1,358.05	1,368.63	10.58	0.00	
2025002325	02154001	RE	2023	HAIGLER, MICHAEL & LYBRAND, LINDA H	6/29/2026	**Value**	203,300	204,680	1,380		PUV ROLLBACK
						Tax	1,335.47	1,344.54	9.07		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	2.15	2.15		
						Tax TTL	1,335.47	1,346.69	11.22	0.00	
2025002290	02254014D	RE	2025	BAKER, ROBERT B	6/19/2026	**Value**	14,600	78,770	64,170		PUV ROLLBACK
						Tax	72.83	392.91	320.08		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	18.40	18.40		
						Tax TTL	72.83	411.31	338.48	0.00	
2025002290	02254014D	RE	2024	BAKER, ROBERT B	6/19/2026	**Value**	12,300	48,360	36,060		PUV ROLLBACK
						Tax	82.17	323.05	240.88		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	35.53	35.53		
						Tax TTL	82.17	358.58	276.41	0.00	
2025002290	02254014D	RE	2023	BAKER, ROBERT B	6/19/2026	**Value**	12,300	48,360	36,060		PUV ROLLBACK
						Tax	80.80	317.68	236.88		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	56.26	56.26		
						Tax TTL	80.80	373.94	293.14	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002256	08096011J	RE	2025	TOMBERLIN, GREGORY SCOTT & KIKER, SUZETTE T	6/11/2026	**Value**	30,900	295,700	264,800		PUV ROLLBACK
						Tax	150.86	1,443.61	1,292.75		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	74.34	74.34		
						Tax TTL	150.86	1,517.95	1,367.09	0.00	
2025002256	08096011J	RE	2024	TOMBERLIN, GREGORY SCOTT & KIKER, SUZETTE T	6/11/2026	**Value**	17,700	113,000	95,300		PUV ROLLBACK
						Tax	116.06	740.94	624.88		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	92.17	92.17		
						Tax TTL	116.06	833.11	717.05	0.00	
2025002256	08096011J	RE	2023	TOMBERLIN, GREGORY SCOTT & KIKER, SUZETTE T	6/11/2026	**Value**	27,290	119,900	92,610		PUV ROLLBACK
						Tax	177.22	778.63	601.41		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	142.84	142.84		
						Tax TTL	177.22	921.47	744.25	0.00	
				Totals for Type PUV Rollback :		**Value**	**921,890**	**4,082,160**	**3,160,270**		
						Tax	**5,484.20**	**23,485.54**	**18,001.34**		
						LL	**0.00**	**0.00**	**0.00**		
						INT	**0.00**	**2,363.44**	**2,363.44**		
						Tax TTL	**5,484.20**	**25,848.98**	**20,364.78**	**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
2025002288	409323	PP	2025	DOGS DAY OUT GROOMING & PE	6/18/2026	**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**	

Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002332	2785144	PP	2025	TAYLOR CONSTRUCTION OF NOR	6/29/2026	**Value**	22,464	92,698	70,234		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	173.02	713.96	540.94		
						LL	17.30	125.49	108.19		
						INT	0.00	0.00	0.00		
						Tax TTL	190.32	839.45	649.13	0.00	
2025002332	2785144	PP	2024	TAYLOR CONSTRUCTION OF NOR	6/29/2026	**Value**	23,630	103,834	80,204		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	242.28	1,064.61	822.33		
						LL	0.00	246.70	246.70		
						INT	0.00	0.00	0.00		
						Tax TTL	242.28	1,311.31	1,069.03	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002332	2785144	PP	2023	TAYLOR CONSTRUCTION OF NOR	6/29/2026	**Value**	6,758	106,702	99,944		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	68.59	1,082.92	1,014.33		
						LL	6.86	412.58	405.72		
						INT	0.00	0.00	0.00		
						Tax TTL	75.45	1,495.50	1,420.05	0.00	
2025002332	2785144	PP	2022	TAYLOR CONSTRUCTION OF NOR	6/29/2026	**Value**	7,765	23,370	15,605		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	78.81	237.18	158.37		
						LL	7.88	87.07	79.19		
						INT	0.00	0.00	0.00		
						Tax TTL	86.69	324.25	237.56	0.00	
2025002332	2785144	PP	2021	TAYLOR CONSTRUCTION OF NOR	6/29/2026	**Value**	8,166	23,814	15,648		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	82.75	241.31	158.56		
						LL	8.28	103.41	95.13		
						INT	0.00	0.00	0.00		
						Tax TTL	91.03	344.72	253.69	0.00	
2025002312	407214	PP	2025	ARCHITECH SPORTS & PHYSICA	6/26/2026	**Value**	37,370	49,323	11,953		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	241.75	319.07	77.32		
						LL	24.18	39.64	15.46		
						INT	0.00	0.00	0.00		
						Tax TTL	265.93	358.71	92.78	0.00	
2025002312	407214	PP	2024	ARCHITECH SPORTS & PHYSICA	6/26/2026	**Value**	40,533	54,718	14,185		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	334.07	450.99	116.92		
						LL	33.41	68.48	35.07		
						INT	0.00	0.00	0.00		
						Tax TTL	367.48	519.47	151.99	0.00	
2025002303	407816	PP	2025	BRANDON REEVES AUTO WORLD	6/25/2026	**Value**	57,936	86,571	28,635		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	506.48	756.80	250.32		
						LL	50.66	100.73	50.07		
						INT	0.00	0.00	0.00		
						Tax TTL	557.14	857.53	300.39	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002303	407816	PP	2024	BRANDON REEVES AUTO WORLD	6/25/2026	**Value**	50,509	50,509	0		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	550.80	550.80	0.00		
						LL	55.08	55.08	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	605.88	605.88	0.00	0.00	
2025002303	407816	PP	2023	BRANDON REEVES AUTO WORLD	6/25/2026	**Value**	55,372	55,372	0		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	603.83	603.83	0.00		
						LL	60.38	60.38	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	664.21	664.21	0.00	0.00	
2025002303	407816	PP	2022	BRANDON REEVES AUTO WORLD	6/25/2026	**Value**	63,770	63,770	0		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	695.41	695.41	0.00		
						LL	69.54	69.54	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	764.95	764.95	0.00	0.00	
2025002303	407816	PP	2021	BRANDON REEVES AUTO WORLD	6/25/2026	**Value**	51,708	87,730	36,022		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	563.88	956.70	392.82		
						LL	56.39	292.08	235.69		
						INT	0.00	0.00	0.00		
						Tax TTL	620.27	1,248.78	628.51	0.00	
2025002310	408909	PP	2025	CRG AGRICULTURAL PROPERTIE	6/26/2026	**Value**	807,484	1,061,544	254,060		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	4,086.68	5,372.47	1,285.79		
						LL	0.00	257.16	257.16		
						INT	0.00	0.00	0.00		
						Tax TTL	4,086.68	5,629.63	1,542.95	0.00	
2025002310	408909	PP	2024	CRG AGRICULTURAL PROPERTIE	6/26/2026	**Value**	475,970	1,182,606	706,636		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,205.66	7,964.85	4,759.19		
						LL	0.00	1,427.76	1,427.76		
						INT	0.00	0.00	0.00		
						Tax TTL	3,205.66	9,392.61	6,186.95	0.00	

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2025002310	408909	PP	2023	CRG AGRICULTURAL PROPERTIE	6/26/2026	**Value**	512,304	830,016	317,712		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,355.59	5,436.60	2,081.01		
						LL	0.00	832.40	832.40		
						INT	0.00	0.00	0.00		
						Tax TTL	3,355.59	6,269.00	2,913.41	0.00	
2025002310	408909	PP	2022	CRG AGRICULTURAL PROPERTIE	6/26/2026	**Value**	558,567	814,015	255,448		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,658.61	5,331.80	1,673.19		
						LL	0.00	836.59	836.59		
						INT	0.00	0.00	0.00		
						Tax TTL	3,658.61	6,168.39	2,509.78	0.00	
2025002310	408909	PP	2021	CRG AGRICULTURAL PROPERTIE	6/26/2026	**Value**	551,123	765,359	214,236		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,606.00	5,007.74	1,401.74		
						LL	0.00	841.05	841.05		
						INT	0.00	0.00	0.00		
						Tax TTL	3,606.00	5,848.79	2,242.79	0.00	
2025002304	409280	PP	2024	DIVERSIFIED UTILITY GROUP	6/25/2026	**Value**	2,964,224	3,020,114	55,890		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	35,914.54	36,591.70	677.16		
						LL	0.00	203.15	203.15		
						INT	0.00	0.00	0.00		
						Tax TTL	35,914.54	36,794.85	880.31	0.00	
2025002304	409280	PP	2023	DIVERSIFIED UTILITY GROUP	6/25/2026	**Value**	2,154,617	2,224,071	69,454		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	24,672.52	25,467.84	795.32		
						LL	0.00	318.13	318.13		
						INT	0.00	0.00	0.00		
						Tax TTL	24,672.52	25,785.97	1,113.45	0.00	
2025002304	409280	PP	2022	DIVERSIFIED UTILITY GROUP	6/25/2026	**Value**	1,948,118	2,007,004	58,886		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	22,307.90	22,982.20	674.30		
						LL	2,230.79	2,567.94	337.15		
						INT	0.00	0.00	0.00		
						Tax TTL	24,538.69	25,550.14	1,011.45	0.00	

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2025002304	409280	PP	2021	DIVERSIFIED UTILITY GROUP	6/25/2026	**Value**	1,548,472	1,561,795	13,323		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	17,689.74	17,841.95	152.21		
						LL	1,768.97	1,860.29	91.32		
						INT	0.00	0.00	0.00		
						Tax TTL	19,458.71	19,702.24	243.53	0.00	
2025002289	409323	PP	2025	DOGS DAY OUT GROOMING & PE	6/18/2026	**Value**	0	25,441	25,441		TAX CODE CHANGE
Public Notes:						**Tax**	0.00	128.76	128.76		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	128.76	128.76	0.00	
2025002317	409501	PP	2025	EAST COAST LLC	6/26/2026	**Value**	755,519	974,076	218,557		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	5,031.00	6,486.37	1,455.37		
						LL	0.00	291.07	291.07		
						INT	0.00	0.00	0.00		
						Tax TTL	5,031.00	6,777.44	1,746.44	0.00	
2025002317	409501	PP	2024	EAST COAST LLC	6/26/2026	**Value**	256,858	629,968	373,110		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,717.10	4,211.34	2,494.24		
						LL	171.71	919.98	748.27		
						INT	0.00	0.00	0.00		
						Tax TTL	1,888.81	5,131.32	3,242.51	0.00	
2025002317	409501	PP	2023	EAST COAST LLC	6/26/2026	**Value**	12,728	506,914	494,186		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	83.79	3,337.01	3,253.22		
						LL	0.00	1,301.29	1,301.29		
						INT	0.00	0.00	0.00		
						Tax TTL	83.79	4,638.30	4,554.51	0.00	
2025002317	409501	PP	2022	EAST COAST LLC	6/26/2026	**Value**	13,398	325,455	312,057		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	88.20	2,142.47	2,054.27		
						LL	0.00	1,027.14	1,027.14		
						INT	0.00	0.00	0.00		
						Tax TTL	88.20	3,169.61	3,081.41	0.00	

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2025002317	409501	PP	2021	EAST COAST LLC	6/26/2026	**Value**	14,103	250,937	236,834		TMA AUDIT DISCOVERY
						Tax	92.94	1,653.67	1,560.73		
Public Notes:						**LL**	0.00	936.44	936.44		
						INT	0.00	0.00	0.00		
						Tax TTL	92.94	2,590.11	2,497.17	0.00	
2025002307	409824	PP	2025	FARLEY'S PIZZA	6/26/2026	**Value**	116,952	119,075	2,123		TMA AUDIT DISCOVERY
						Tax	583.71	594.30	10.59		
Public Notes:						**LL**	0.00	2.02	2.02		
						INT	0.00	0.00	0.00		
						Tax TTL	583.71	596.32	12.61	0.00	
2025002307	409824	PP	2024	FARLEY'S PIZZA	6/26/2026	**Value**	126,064	129,562	3,498		TMA AUDIT DISCOVERY
						Tax	837.32	860.55	23.23		
Public Notes:						**LL**	0.00	6.40	6.40		
						INT	0.00	0.00	0.00		
						Tax TTL	837.32	866.95	29.63	0.00	
2025002307	409824	PP	2023	FARLEY'S PIZZA	6/26/2026	**Value**	130,917	135,915	4,998		TMA AUDIT DISCOVERY
						Tax	858.03	890.79	32.76		
Public Notes:						**LL**	0.00	12.06	12.06		
						INT	0.00	0.00	0.00		
						Tax TTL	858.03	902.85	44.82	0.00	
2025002307	409824	PP	2022	FARLEY'S PIZZA	6/26/2026	**Value**	112,934	130,373	17,439		TMA AUDIT DISCOVERY
						Tax	740.17	854.46	114.29		
Public Notes:						**LL**	74.02	128.79	54.77		
						INT	0.00	0.00	0.00		
						Tax TTL	814.19	983.25	169.06	0.00	
2025002307	409824	PP	2021	FARLEY'S PIZZA	6/26/2026	**Value**	42,163	60,931	18,768		TMA AUDIT DISCOVERY
						Tax	274.57	396.78	122.21		
Public Notes:						**LL**	27.46	96.85	69.39		
						INT	0.00	0.00	0.00		
						Tax TTL	302.03	493.63	191.60	0.00	

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2025002316	410384	PP	2025	GREENSPACE LAWN CARE INC	6/26/2026	**Value**	184,320	290,165	105,845		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	920.86	1,449.66	528.80		
						LL	0.00	105.76	105.76		
						INT	0.00	0.00	0.00		
						Tax TTL	920.86	1,555.42	634.56	0.00	
2025002316	410384	PP	2024	GREENSPACE LAWN CARE INC	6/26/2026	**Value**	175,337	284,067	108,730		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,144.60	1,854.39	709.79		
						LL	0.00	212.94	212.94		
						INT	0.00	0.00	0.00		
						Tax TTL	1,144.60	2,067.33	922.73	0.00	
2025002316	410384	PP	2023	GREENSPACE LAWN CARE INC	6/26/2026	**Value**	129,390	238,120	108,730		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	819.04	1,507.30	688.26		
						LL	0.00	275.30	275.30		
						INT	0.00	0.00	0.00		
						Tax TTL	819.04	1,782.60	963.56	0.00	
2025002316	410384	PP	2022	GREENSPACE LAWN CARE INC	6/26/2026	**Value**	135,307	265,123	129,816		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	860.55	1,686.18	825.63		
						LL	0.00	412.82	412.82		
						INT	0.00	0.00	0.00		
						Tax TTL	860.55	2,099.00	1,238.45	0.00	
2025002316	410384	PP	2021	GREENSPACE LAWN CARE INC	6/26/2026	**Value**	63,113	65,967	2,854		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	397.74	415.72	17.98		
						LL	0.00	10.79	10.79		
						INT	0.00	0.00	0.00		
						Tax TTL	397.74	426.51	28.77	0.00	
2025002339	411002	PP	2025	INNOVATIVE DIGITAL SYSTEMS	6/29/2026	**Value**	1,748,341	1,806,868	58,527		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	11,310.02	11,688.63	378.61		
						LL	0.00	75.72	75.72		
						INT	0.00	0.00	0.00		
						Tax TTL	11,310.02	11,764.35	454.33	0.00	

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2025002339	411002	PP	2024	INNOVATIVE DIGITAL SYSTEMS	6/29/2026	**Value**	1,041,744	1,652,196	610,452		TMA AUDIT DISCOVERY
						Tax	8,586.05	13,617.40	5,031.35		
Public Notes:						**LL**	0.00	1,509.41	1,509.41		
						INT	0.00	0.00	0.00		
						Tax TTL	8,586.05	15,126.81	6,540.76	0.00	
2025002339	411002	PP	2023	INNOVATIVE DIGITAL SYSTEMS	6/29/2026	**Value**	915,867	1,540,157	624,290		TMA AUDIT DISCOVERY
						Tax	7,483.55	12,584.62	5,101.07		
Public Notes:						**LL**	0.00	2,040.43	2,040.43		
						INT	0.00	0.00	0.00		
						Tax TTL	7,483.55	14,625.05	7,141.50	0.00	
2025002339	411002	PP	2022	INNOVATIVE DIGITAL SYSTEMS	6/29/2026	**Value**	210,263	747,260	536,997		TMA AUDIT DISCOVERY
						Tax	1,718.06	6,105.86	4,387.80		
Public Notes:						**LL**	171.81	2,365.71	2,193.90		
						INT	0.00	0.00	0.00		
						Tax TTL	1,889.87	8,471.57	6,581.70	0.00	
2025002339	411002	PP	2021	INNOVATIVE DIGITAL SYSTEMS	6/29/2026	**Value**	252,127	289,524	37,397		TMA AUDIT DISCOVERY
						Tax	2,060.13	2,365.70	305.57		
Public Notes:						**LL**	206.01	389.36	183.35		
						INT	0.00	0.00	0.00		
						Tax TTL	2,266.14	2,755.06	488.92	0.00	
2025002257	411639	PP	2025	LAKE PARK NURSING & REHAB	6/12/2026	**Value**	183,748	212,742	28,994		TMA AUDIT DISCOVERY
						Tax	1,170.29	1,354.95	184.66		
Public Notes:						**LL**	0.00	36.36	36.36		
						INT	0.00	0.00	0.00		
						Tax TTL	1,170.29	1,391.31	221.02	0.00	
2025002257	411639	PP	2024	LAKE PARK NURSING & REHAB	6/12/2026	**Value**	236,639	243,942	7,303		TMA AUDIT DISCOVERY
						Tax	2,015.45	2,077.65	62.20		
Public Notes:						**LL**	0.00	17.52	17.52		
						INT	0.00	0.00	0.00		
						Tax TTL	2,015.45	2,095.17	79.72	0.00	

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2025002257	411639	PP	2023	LAKE PARK NURSING & REHAB	6/12/2026	**Value**	243,029	259,617	16,588		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,028.32	2,166.76	138.44		
						LL	0.00	53.88	53.88		
						INT	0.00	0.00	0.00		
						Tax TTL	2,028.32	2,220.64	192.32	0.00	
2025002257	411639	PP	2022	LAKE PARK NURSING & REHAB	6/12/2026	**Value**	242,444	267,899	25,455		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,023.44	2,235.89	212.45		
						LL	0.00	104.36	104.36		
						INT	0.00	0.00	0.00		
						Tax TTL	2,023.44	2,340.25	316.81	0.00	
2025002257	411639	PP	2021	LAKE PARK NURSING & REHAB	6/12/2026	**Value**	245,892	264,065	18,173		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,021.48	2,170.88	149.40		
						LL	0.00	87.44	87.44		
						INT	0.00	0.00	0.00		
						Tax TTL	2,021.48	2,258.32	236.84	0.00	
2025002308	412301	PP	2025	MEADOW WOOD FARMS LLC	6/26/2026	**Value**	288,013	411,656	123,643		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,379.01	1,971.01	592.00		
						LL	0.00	118.40	118.40		
						INT	0.00	0.00	0.00		
						Tax TTL	1,379.01	2,089.41	710.40	0.00	
2025002308	412301	PP	2024	MEADOW WOOD FARMS LLC	6/26/2026	**Value**	267,586	412,024	144,438		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,707.73	2,629.54	921.81		
						LL	170.77	447.32	276.55		
						INT	0.00	0.00	0.00		
						Tax TTL	1,878.50	3,076.86	1,198.36	0.00	
2025002308	412301	PP	2023	MEADOW WOOD FARMS LLC	6/26/2026	**Value**	290,820	422,189	131,369		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,826.06	2,650.92	824.86		
						LL	0.00	329.94	329.94		
						INT	0.00	0.00	0.00		
						Tax TTL	1,826.06	2,980.86	1,154.80	0.00	

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2025002308	412301	PP	2022	MEADOW WOOD FARMS LLC	6/26/2026	**Value**	277,976	422,047	144,071		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,745.41	2,650.03	904.62		
						LL	174.54	626.85	452.31		
						INT	0.00	0.00	0.00		
						Tax TTL	1,919.95	3,276.88	1,356.93	0.00	
2025002308	412301	PP	2021	MEADOW WOOD FARMS LLC	6/26/2026	**Value**	257,626	399,862	142,236		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,589.04	2,466.35	877.31		
						LL	158.90	685.29	526.39		
						INT	0.00	0.00	0.00		
						Tax TTL	1,747.94	3,151.64	1,403.70	0.00	
2025002311	413772	PP	2025	RATLIFF, RANDY	6/26/2026	**Value**	597,963	618,925	20,962		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,913.87	3,016.02	102.15		
						LL	0.00	20.43	20.43		
						INT	0.00	0.00	0.00		
						Tax TTL	2,913.87	3,036.45	122.58	0.00	
2025002311	413772	PP	2024	RATLIFF, RANDY	6/26/2026	**Value**	567,824	685,807	117,983		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,712.43	4,483.81	771.38		
						LL	0.00	231.41	231.41		
						INT	0.00	0.00	0.00		
						Tax TTL	3,712.43	4,715.22	1,002.79	0.00	
2025002311	413772	PP	2023	RATLIFF, RANDY	6/26/2026	**Value**	384,879	621,617	236,738		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,473.23	3,994.51	1,521.28		
						LL	0.00	608.51	608.51		
						INT	0.00	0.00	0.00		
						Tax TTL	2,473.23	4,603.02	2,129.79	0.00	
2025002311	413772	PP	2022	RATLIFF, RANDY	6/26/2026	**Value**	393,152	576,685	183,533		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,526.39	3,705.78	1,179.39		
						LL	0.00	589.69	589.69		
						INT	0.00	0.00	0.00		
						Tax TTL	2,526.39	4,295.47	1,769.08	0.00	

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2025002311	413772	PP	2021	RATLIFF, RANDY	6/26/2026	**Value**	186,833	360,658	173,825		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,204.70	2,325.52	1,120.82		
						LL	0.00	672.49	672.49		
						INT	0.00	0.00	0.00		
						Tax TTL	1,204.70	2,998.01	1,793.31	0.00	
2025002313	413774	PP	2025	RATLIFF ROBERT M JR	6/26/2026	**Value**	445,809	718,492	272,683		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,172.43	3,501.21	1,328.78		
						LL	0.00	265.76	265.76		
						INT	0.00	0.00	0.00		
						Tax TTL	2,172.43	3,766.97	1,594.54	0.00	
2025002313	413774	PP	2024	RATLIFF ROBERT M JR	6/26/2026	**Value**	495,366	658,758	163,392		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,238.70	4,306.96	1,068.26		
						LL	0.00	320.48	320.48		
						INT	0.00	0.00	0.00		
						Tax TTL	3,238.70	4,627.44	1,388.74	0.00	
2025002313	413774	PP	2023	RATLIFF ROBERT M JR	6/26/2026	**Value**	445,577	722,905	277,328		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,863.28	4,645.39	1,782.11		
						LL	0.00	712.84	712.84		
						INT	0.00	0.00	0.00		
						Tax TTL	2,863.28	5,358.23	2,494.95	0.00	
2025002313	413774	PP	2022	RATLIFF ROBERT M JR	6/26/2026	**Value**	359,039	639,708	280,669		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,307.18	4,110.76	1,803.58		
						LL	0.00	901.79	901.79		
						INT	0.00	0.00	0.00		
						Tax TTL	2,307.18	5,012.55	2,705.37	0.00	
2025002313	413774	PP	2021	RATLIFF ROBERT M JR	6/26/2026	**Value**	191,664	450,185	258,521		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,235.85	2,902.79	1,666.94		
						LL	0.00	1,000.16	1,000.16		
						INT	0.00	0.00	0.00		
						Tax TTL	1,235.85	3,902.95	2,667.10	0.00	

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2025002335	413969	PP	2025	RM MATTHEWS LLC	6/29/2026	**Value**	178,600	180,144	1,544		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,195.55	1,205.88	10.33		
						LL	0.00	2.07	2.07		
						INT	0.00	0.00	0.00		
						Tax TTL	1,195.55	1,207.95	12.40	0.00	
2025002335	413969	PP	2024	RM MATTHEWS LLC	6/29/2026	**Value**	105,915	107,753	1,838		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	908.22	923.98	15.76		
						LL	0.00	4.73	4.73		
						INT	0.00	0.00	0.00		
						Tax TTL	908.22	928.71	20.49	0.00	
2025002309	414848	PP	2025	BROWN, STUART	6/26/2026	**Value**	111,644	139,890	28,246		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	570.17	714.42	144.25		
						LL	57.02	85.87	28.85		
						INT	0.00	0.00	0.00		
						Tax TTL	627.19	800.29	173.10	0.00	
2025002309	414848	PP	2024	BROWN, STUART	6/26/2026	**Value**	118,637	148,452	29,815		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	793.09	992.40	199.31		
						LL	0.00	59.79	59.79		
						INT	0.00	0.00	0.00		
						Tax TTL	793.09	1,052.19	259.10	0.00	
2025002281	414958	PP	2025	TDR PLUMBING LLC	6/17/2026	**Value**	149,625	151,839	2,214		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	713.56	724.12	10.56		
						LL	71.36	73.47	2.11		
						INT	0.00	0.00	0.00		
						Tax TTL	784.92	797.59	12.67	0.00	
2025002281	414958	PP	2024	TDR PLUMBING LLC	6/17/2026	**Value**	57,703	143,900	86,197		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	368.84	919.81	550.97		
						LL	36.88	202.18	165.30		
						INT	0.00	0.00	0.00		
						Tax TTL	405.72	1,121.99	716.27	0.00	

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2025002281	414958	PP	2023	TDR PLUMBING LLC	6/17/2026	**Value**	46,211	54,791	8,580		TMA AUDIT DISCOVERY
						Tax	292.10	346.33	54.23		
Public Notes:						**LL**	0.00	21.69	21.69		
						INT	0.00	0.00	0.00		
						Tax TTL	292.10	368.02	75.92	0.00	
2025002281	414958	PP	2022	TDR PLUMBING LLC	6/17/2026	**Value**	50,334	52,560	2,226		TMA AUDIT DISCOVERY
						Tax	318.16	332.23	14.07		
Public Notes:						**LL**	0.00	7.04	7.04		
						INT	0.00	0.00	0.00		
						Tax TTL	318.16	339.27	21.11	0.00	
2025002281	414958	PP	2021	TDR PLUMBING LLC	6/17/2026	**Value**	41,498	50,641	9,143		TMA AUDIT DISCOVERY
						Tax	262.31	320.10	57.79		
Public Notes:						**LL**	0.00	34.67	34.67		
						INT	0.00	0.00	0.00		
						Tax TTL	262.31	354.77	92.46	0.00	
2025002327	415622	PP	2021	UNION COUNTY MARKET CENTER	6/29/2026	**Value**	219,608	234,522	14,914		TMA AUDIT DISCOVERY
						Tax	1,771.14	1,891.42	120.28		
Public Notes:						**LL**	0.00	72.17	72.17		
						INT	0.00	0.00	0.00		
						Tax TTL	1,771.14	1,963.59	192.45	0.00	
2025002319	578798	PP	2025	NASH COMPANY INC & NASH, SUE C	6/29/2026	**Value**	430,340	537,015	106,675		TMA AUDIT DISCOVERY
						Tax	2,057.89	2,568.01	510.12		
Public Notes:						**LL**	117.76	168.77	51.01		
						INT	0.00	0.00	0.00		
						Tax TTL	2,175.65	2,736.78	561.13	0.00	
2025002338	581390	PP	2025	BENNY & MIMI INC	6/29/2026	**Value**	45,051	104,500	59,449		TMA AUDIT DISCOVERY
						Tax	393.84	913.54	519.70		
Public Notes:						**LL**	39.38	143.33	103.95		
						INT	0.00	0.00	0.00		
						Tax TTL	433.22	1,056.87	623.65	0.00	

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2025002338	581390	PP	2024	BENNY & MIMI INC	6/29/2026	**Value**	46,709	104,500	57,791		TMA AUDIT DISCOVERY
						Tax	509.36	1,139.57	630.21		
Public Notes:						**LL**	50.94	239.99	189.05		
						INT	0.00	0.00	0.00		
						Tax TTL	560.30	1,379.56	819.26	0.00	
2025002338	581390	PP	2023	BENNY & MIMI INC	6/29/2026	**Value**	69,902	104,500	34,598		TMA AUDIT DISCOVERY
						Tax	762.28	1,139.57	377.29		
Public Notes:						**LL**	0.00	150.92	150.92		
						INT	0.00	0.00	0.00		
						Tax TTL	762.28	1,290.49	528.21	0.00	
2025002338	581390	PP	2022	BENNY & MIMI INC	6/29/2026	**Value**	81,386	104,500	23,114		TMA AUDIT DISCOVERY
						Tax	887.51	1,139.57	252.06		
Public Notes:						**LL**	88.75	214.78	126.03		
						INT	0.00	0.00	0.00		
						Tax TTL	976.26	1,354.35	378.09	0.00	
2025002338	581390	PP	2021	BENNY & MIMI INC	6/29/2026	**Value**	82,593	104,500	21,907		TMA AUDIT DISCOVERY
						Tax	900.68	1,139.57	238.89		
Public Notes:						**LL**	90.07	233.40	143.33		
						INT	0.00	0.00	0.00		
						Tax TTL	990.75	1,372.97	382.22	0.00	
2025002323	587219	PP	2024	AREY, FRANK KESTLER JR	6/29/2026	**Value**	16,924	19,918	2,994		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	110.31	129.83	19.52		
Public Notes:						**LL**	0.00	5.86	5.86		
						INT	0.00	0.00	0.00		
						Tax TTL	110.31	135.69	25.38	0.00	
2025002334	594204	PP	2025	QUEEN CITY TREE SERVICE LL	6/29/2026	**Value**	148,568	264,688	116,120		TMA AUDIT DISCOVERY
						Tax	748.93	1,334.29	585.36		
Public Notes:						**LL**	74.89	191.96	117.07		
						INT	0.00	0.00	0.00		
						Tax TTL	823.82	1,526.25	702.43	0.00	

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2025002334	594204	PP	2024	QUEEN CITY TREE SERVICE LL	6/29/2026	**Value**	174,688	304,635	129,947		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,152.42	2,009.68	857.26		
						LL	0.00	257.18	257.18		
						INT	0.00	0.00	0.00		
						Tax TTL	1,152.42	2,266.86	1,114.44	0.00	
2025002334	594204	PP	2023	QUEEN CITY TREE SERVICE LL	6/29/2026	**Value**	192,346	258,706	66,360		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,245.06	1,674.60	429.54		
						LL	124.51	296.33	171.82		
						INT	0.00	0.00	0.00		
						Tax TTL	1,369.57	1,970.93	601.36	0.00	
2025002334	594204	PP	2022	QUEEN CITY TREE SERVICE LL	6/29/2026	**Value**	199,816	267,958	68,142		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,293.41	1,734.49	441.08		
						LL	129.34	349.89	220.55		
						INT	0.00	0.00	0.00		
						Tax TTL	1,422.75	2,084.38	661.63	0.00	
2025002279	599763	PP	2025	DHRUVIN IV LLC	6/17/2026	**Value**	30,810	180,211	149,401		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	269.34	1,575.40	1,306.06		
						LL	26.93	288.14	261.21		
						INT	0.00	0.00	0.00		
						Tax TTL	296.27	1,863.54	1,567.27	0.00	
2025002279	599763	PP	2024	DHRUVIN IV LLC	6/17/2026	**Value**	30,810	173,977	143,167		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	335.98	1,897.22	1,561.24		
						LL	33.60	501.97	468.37		
						INT	0.00	0.00	0.00		
						Tax TTL	369.58	2,399.19	2,029.61	0.00	
2025002279	599763	PP	2023	DHRUVIN IV LLC	6/17/2026	**Value**	32,840	204,553	171,713		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	358.12	2,230.65	1,872.53		
						LL	35.81	784.82	749.01		
						INT	0.00	0.00	0.00		
						Tax TTL	393.93	3,015.47	2,621.54	0.00	

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2025002279	599763	PP	2022	DHRUVIN IV LLC	6/17/2026	**Value**	34,870	215,884	181,014		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	380.26	2,354.22	1,973.96		
						LL	38.03	1,025.01	986.98		
						INT	0.00	0.00	0.00		
						Tax TTL	418.29	3,379.23	2,960.94	0.00	
2025002279	599763	PP	2021	DHRUVIN IV LLC	6/17/2026	**Value**	36,900	208,851	171,951		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	402.39	2,277.52	1,875.13		
						LL	40.24	1,165.32	1,125.08		
						INT	0.00	0.00	0.00		
						Tax TTL	442.63	3,442.84	3,000.21	0.00	
2025002305	615643	PP	2025	LONE WOLF INDUSTRIES LTD	6/25/2026	**Value**	325,614	764,405	438,791		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,564.25	3,672.20	2,107.95		
						LL	156.43	578.02	421.59		
						INT	0.00	0.00	0.00		
						Tax TTL	1,720.68	4,250.22	2,529.54	0.00	
2025002305	615643	PP	2024	LONE WOLF INDUSTRIES LTD	6/25/2026	**Value**	281,332	769,250	487,918		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,804.74	4,934.74	3,130.00		
						LL	0.00	939.00	939.00		
						INT	0.00	0.00	0.00		
						Tax TTL	1,804.74	5,873.74	4,069.00	0.00	
2025002305	615643	PP	2023	LONE WOLF INDUSTRIES LTD	6/25/2026	**Value**	310,526	460,568	150,042		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,974.32	2,928.29	953.97		
						LL	0.00	381.59	381.59		
						INT	0.00	0.00	0.00		
						Tax TTL	1,974.32	3,309.88	1,335.56	0.00	
2025002305	615643	PP	2022	LONE WOLF INDUSTRIES LTD	6/25/2026	**Value**	41,563	192,104	150,541		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	264.26	1,221.40	957.14		
						LL	26.43	504.99	478.56		
						INT	0.00	0.00	0.00		
						Tax TTL	290.69	1,726.39	1,435.70	0.00	

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2025002305	615643	PP	2021	LONE WOLF INDUSTRIES LTD	6/25/2026	**Value**	54,336	113,440	59,104		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	345.14	720.57	375.43		
						LL	0.00	225.26	225.26		
						INT	0.00	0.00	0.00		
						Tax TTL	345.14	945.83	600.69	0.00	
2025002318	616088	PP	2025	BEST REMODELING & HOME REP	6/29/2026	**Value**	47,340	59,175	11,835		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	218.19	272.74	54.55		
						LL	21.82	32.73	10.91		
						INT	0.00	0.00	0.00		
						Tax TTL	240.01	305.47	65.46	0.00	
2025002318	616088	PP	2024	BEST REMODELING & HOME REP	6/29/2026	**Value**	57,285	71,606	14,321		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	358.09	447.61	89.52		
						LL	35.81	62.67	26.86		
						INT	0.00	0.00	0.00		
						Tax TTL	393.90	510.28	116.38	0.00	
2025002318	616088	PP	2023	BEST REMODELING & HOME REP	6/29/2026	**Value**	64,935	81,169	16,234		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	403.18	503.98	100.80		
						LL	0.00	40.32	40.32		
						INT	0.00	0.00	0.00		
						Tax TTL	403.18	544.30	141.12	0.00	
2025002318	616088	PP	2022	BEST REMODELING & HOME REP	6/29/2026	**Value**	67,995	84,994	16,999		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	422.18	527.73	105.55		
						LL	42.22	94.99	52.77		
						INT	0.00	0.00	0.00		
						Tax TTL	464.40	622.72	158.32	0.00	
2025002318	616088	PP	2021	BEST REMODELING & HOME REP	6/29/2026	**Value**	60,507	75,634	15,127		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	379.08	473.85	94.77		
						LL	37.91	94.77	56.86		
						INT	0.00	0.00	0.00		
						Tax TTL	416.99	568.62	151.63	0.00	

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2025002282	620607	PP	2025	JUDO MANAGEMENT INC	6/17/2026	**Value**	53,951	55,824	1,873		TMA AUDIT DISCOVERY
						Tax	350.90	363.08	12.18		
Public Notes:						**LL**	35.09	37.53	2.44		
						INT	0.00	0.00	0.00		
						Tax TTL	385.99	400.61	14.62	0.00	
2025002282	620607	PP	2024	JUDO MANAGEMENT INC	6/17/2026	**Value**	56,793	58,666	1,873		TMA AUDIT DISCOVERY
						Tax	469.39	484.87	15.48		
Public Notes:						**LL**	46.94	51.58	4.64		
						INT	0.00	0.00	0.00		
						Tax TTL	516.33	536.45	20.12	0.00	
2025002282	620607	PP	2023	JUDO MANAGEMENT INC	6/17/2026	**Value**	94,583	96,456	1,873		TMA AUDIT DISCOVERY
						Tax	776.34	791.71	15.37		
Public Notes:						**LL**	0.00	6.15	6.15		
						INT	0.00	0.00	0.00		
						Tax TTL	776.34	797.86	21.52	0.00	
2025002282	620607	PP	2022	JUDO MANAGEMENT INC	6/17/2026	**Value**	103,350	105,148	1,798		TMA AUDIT DISCOVERY
						Tax	848.30	863.05	14.75		
Public Notes:						**LL**	84.83	92.21	7.38		
						INT	0.00	0.00	0.00		
						Tax TTL	933.13	955.26	22.13	0.00	
2025002282	620607	PP	2021	JUDO MANAGEMENT INC	6/17/2026	**Value**	0	111,223	111,223		TMA AUDIT DISCOVERY
						Tax	0.00	912.25	912.25		
Public Notes:						**LL**	0.00	547.35	547.35		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,459.60	1,459.60	0.00	
2025002336	620641	PP	2025	REDEX LOGISTICS LLC	6/29/2026	**Value**	821,724	1,007,963	186,239		TMA AUDIT DISCOVERY
						Tax	3,975.50	4,876.52	901.02		
Public Notes:						**LL**	397.55	577.75	180.20		
						INT	0.00	0.00	0.00		
						Tax TTL	4,373.05	5,454.27	1,081.22	0.00	

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2025002336	620641	PP	2024	REDEX LOGISTICS LLC	6/29/2026	**Value**	473,918	895,915	421,997		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,089.00	5,839.57	2,750.57		
						LL	308.90	1,134.09	825.19		
						INT	0.00	0.00	0.00		
						Tax TTL	3,397.90	6,973.66	3,575.76	0.00	
2025002336	620641	PP	2023	REDEX LOGISTICS LLC	6/29/2026	**Value**	337,575	723,812	386,237		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,161.16	4,633.84	2,472.68		
						LL	216.12	1,205.19	989.07		
						INT	0.00	0.00	0.00		
						Tax TTL	2,377.28	5,839.03	3,461.75	0.00	
2025002336	620641	PP	2022	REDEX LOGISTICS LLC	6/29/2026	**Value**	375,084	597,078	221,994		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,334.15	3,715.62	1,381.47		
						LL	233.42	924.16	690.74		
						INT	0.00	0.00	0.00		
						Tax TTL	2,567.57	4,639.78	2,072.21	0.00	
2025002336	620641	PP	2021	REDEX LOGISTICS LLC	6/29/2026	**Value**	0	473,003	473,003		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	2,939.71	2,939.71		
						LL	0.00	1,763.83	1,763.83		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	4,703.54	4,703.54	0.00	
2025002299	650567	PP	2024	CREAMA CAFE LLC	6/24/2026	**Value**	5,069	6,869	1,800		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	61.42	83.22	21.80		
						LL	6.14	8.32	2.18		
						INT	0.00	0.00	0.00		
						Tax TTL	67.56	91.54	23.98	0.00	
2025002300	657839	PP	2024	SARINABELLA LLC	6/24/2026	**Value**	0	5,000	5,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	51.27	51.27		
						LL	0.00	15.38	15.38		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	66.65	66.65	0.00	

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2025002306	657961	PP	2024	MOSS & BLACK SALON LLC	6/25/2026	**Value**	0	61,691	61,691		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	632.52	632.52		
						LL	0.00	189.76	189.76		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	822.28	822.28	0.00	
2025002306	657961	PP	2023	MOSS & BLACK SALON LLC	6/25/2026	**Value**	0	57,619	57,619		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	584.78	584.78		
						LL	0.00	233.91	233.91		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	818.69	818.69	0.00	
2025002306	657961	PP	2022	MOSS & BLACK SALON LLC	6/25/2026	**Value**	0	59,831	59,831		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	607.22	607.22		
						LL	0.00	303.61	303.61		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	910.83	910.83	0.00	
2025002306	657961	PP	2021	MOSS & BLACK SALON LLC	6/25/2026	**Value**	0	59,262	59,262		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	600.50	600.50		
						LL	0.00	360.30	360.30		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	960.80	960.80	0.00	
2025002280	658115	PP	2024	KIDDIE COVE, LLC	6/17/2026	**Value**	0	1,677	1,677		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	14.03	14.03		
						LL	0.00	4.21	4.21		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	18.24	18.24	0.00	
2025002280	658115	PP	2023	KIDDIE COVE, LLC	6/17/2026	**Value**	0	2,009	2,009		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	16.58	16.58		
						LL	0.00	6.63	6.63		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	23.21	23.21	0.00	

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2025002280	658115	PP	2022	KIDDIE COVE, LLC	6/17/2026	**Value**	0	2,191	2,191		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	17.69	17.69		
						LL	0.00	8.85	8.85		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	26.54	26.54	0.00	
2025002280	658115	PP	2021	KIDDIE COVE, LLC	6/17/2026	**Value**	0	2,407	2,407		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	19.41	19.41		
						LL	0.00	11.65	11.65		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	31.06	31.06	0.00	
2025002302	658173	PP	2024	TBH SKINCARE LLC	6/24/2026	**Value**	0	52,545	52,545		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	434.28	434.28		
						LL	0.00	130.28	130.28		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	564.56	564.56	0.00	
2025002302	658173	PP	2023	TBH SKINCARE LLC	6/24/2026	**Value**	0	52,545	52,545		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	431.29	431.29		
						LL	0.00	172.52	172.52		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	603.81	603.81	0.00	
2025002302	658173	PP	2022	TBH SKINCARE LLC	6/24/2026	**Value**	0	52,545	52,545		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	431.29	431.29		
						LL	0.00	215.65	215.65		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	646.94	646.94	0.00	
2025002302	658173	PP	2021	TBH SKINCARE LLC	6/24/2026	**Value**	0	52,545	52,545		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	430.97	430.97		
						LL	0.00	258.58	258.58		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	689.55	689.55	0.00	

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2025002321	658659	PP	2024	WILLIAMS EMILY	6/29/2026	**Value**	0	1,226	1,226		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	10.26	10.26		
						LL	0.00	3.08	3.08		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	13.34	13.34	0.00	
2025002337	669522	PP	2025	HAPPY MEDS LIMITED LIABILI	6/29/2026	**Value**	0	2,000	2,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	9.98	9.98		
						LL	0.00	2.00	2.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11.98	11.98	0.00	
2025002337	669522	PP	2024	HAPPY MEDS LIMITED LIABILI	6/29/2026	**Value**	0	2,000	2,000		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	13.28	13.28		
						LL	0.00	3.98	3.98		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	17.26	17.26	0.00	
2025002330	669540	PP	2025	BAGELGRAM NC LLC	6/29/2026	**Value**	0	20,000	20,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	129.38	129.38		
						LL	0.00	25.88	25.88		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	155.26	155.26	0.00	
2025002330	669540	PP	2024	BAGELGRAM NC LLC	6/29/2026	**Value**	0	20,000	20,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	164.84	164.84		
						LL	0.00	49.45	49.45		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	214.29	214.29	0.00	
2025002331	669662	PP	2025	ACTSOFSOURDOUGH LLC	6/29/2026	**Value**	0	11,187	11,187		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	74.89	74.89		
						LL	0.00	14.98	14.98		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	89.87	89.87	0.00	

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2025002331	669662	PP	2024	ACTSOFSOURDOUGH LLC	6/29/2026	**Value**	0	10,051	10,051		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	86.19	86.19		
						LL	0.00	25.86	25.86		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	112.05	112.05	0.00	
2025002314	676166	PP	2025	WORLD WIDE AUTO LLC	6/26/2026	**Value**	0	2,825	2,825		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	18.91	18.91		
						LL	0.00	3.78	3.78		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	22.69	22.69	0.00	
2025002278	676777	PP	2025	LANEY, RONALD WILSON	6/17/2026	**Value**	0	1,970	1,970		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	9.42	9.42		
						LL	0.00	1.88	1.88		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	11.30	11.30	0.00	
2025002278	676777	PP	2024	LANEY, RONALD WILSON	6/17/2026	**Value**	0	1,970	1,970		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	12.58	12.58		
						LL	0.00	3.77	3.77		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	16.35	16.35	0.00	
2025002315	677543	PP	2025	DUNLAP, JERREL MARIANO	6/26/2026	**Value**	0	1,536	1,536		GAP BILL
Public Notes:						**Tax**	0.00	15.89	15.89		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	15.89	15.89	0.00	
2025002270	677574	PP	2025	AMERICAN EAGLE TRANSPORT L	6/15/2026	**Value**	0	146,700	146,700		CLERICAL ERROR
Public Notes:						**Tax**	0.00	681.57	681.57		
						LL	0.00	68.16	68.16		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	749.73	749.73	0.00	

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2025002285	677600	PP	2025	JENKINS, SHAWANA FRANCES	6/18/2026	Value	0	17,099	17,099		UNLISTED REAL OR PERSONAL PROPERTY
						Tax	0.00	111.21	111.21		
Public Notes:						LL	0.00	22.24	22.24		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	133.45	133.45	0.00	
				Totals for Type Value Change - Discovery :		**Value**	**31,353,992**	**46,030,933**	**14,676,941**		
						Tax	**251,201.14**	**354,314.62**	**103,113.48**		
						LL	**8,250.06**	**48,777.09**	**40,527.03**		
						INT	**0.00**	**0.00**	**0.00**		
						Tax TTL	**259,451.20**	**403,091.71**	**143,640.51**	**0.00**	

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002328	06156004B	RE	2025	TURCOTTE, RIZALYN L & TURCOTTE, DANIEL O	6/29/2026	Value	997,800	987,800	(10,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,635.78	4,589.32	(46.46)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,635.78	4,589.32	(46.46)	46.46	
2025002291	06162700	RE	2025	WAXHAW LADDER 14 LLC	6/19/2026	Value	14,267,700	10,500,000	(3,767,700)		CHANGE VALUE DUE TO AN APPEAL
						Tax	109,889.83	80,871.00	(29,018.83)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	109,889.83	80,871.00	(29,018.83)	29,018.83	

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Correction Listing Report

Union County

Date Posted between 6/1/2026 and 6/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002284	06198101	RE	2025	NOSKOV, ALEXANDER & NOSKOV, JULIA	6/17/2026	**Value**	637,000	589,600	(47,400)		CHANGE VALUE DUE TO AN APPEAL
						Tax	2,959.50	2,739.28	(220.22)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,959.50	2,739.28	(220.22)	220.22	
2025002298	06222009B	RE	2025	SHAW, ANDREW M & SHAW, KATHRYN A	6/19/2026	**Value**	1,670,600	1,498,800	(171,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	8,702.16	7,807.25	(894.91)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,702.16	7,807.25	(894.91)	894.91	
2025002297	07069118C	RE	2025	LOWE'S HOME CENTERS INC	6/19/2026	**Value**	14,120,100	9,975,000	(4,145,100)		CHANGE VALUE DUE TO AN APPEAL
						Tax	92,317.21	65,216.55	(27,100.66)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	92,317.21	65,216.55	(27,100.66)	20,053.99	
2025002283	07123271	RE	2025	POPA, NICOLAE L	6/17/2026	**Value**	561,100	529,100	(32,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,560.74	3,357.67	(203.07)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,560.74	3,357.67	(203.07)	148.67	
2025002329	07147042	RE	2025	WATSON, HAZEL JEAN & WATSON, CRAWFORD BEATTY	6/29/2026	**Value**	17,400	6,900	(10,500)		CHANGE VALUE DUE TO AN APPEAL
						Tax	113.17	44.88	(68.29)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	113.17	44.88	(68.29)	50.44	
2025002265	09185012	RE	2025	CAROLINA DEVELOPMENT SERVI	6/15/2026	**Value**	1,077,800	850,000	(227,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	9,422.13	7,430.70	(1,991.43)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	9,422.13	7,430.70	(1,991.43)	989.11	

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Correction Listing Report

Union County

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002296	09195022A	RE	2025	WILLOW GLEN ROCKFORD LLC E & WILLOW GLEN WESTGATE LL	6/19/2026	**Value**	16,254,000	14,000,000	(2,254,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	142,092.47	122,388.00	(19,704.47)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	142,092.47	122,388.00	(19,704.47)	9,786.87	
2025002295	09216076A	RE	2025	LOWE'S, HOME CENTERS INC	6/19/2026	**Value**	993,000	760,100	(232,900)		CHANGE VALUE DUE TO AN APPEAL
						Tax	8,680.81	6,644.79	(2,036.02)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	8,680.81	6,644.79	(2,036.02)	1,011.26	
2025002293	09216077A	RE	2025	LOWE'S, HOME CENTERS INC	6/19/2026	**Value**	1,854,300	1,421,000	(433,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	16,210.29	12,422.38	(3,787.91)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	16,210.29	12,422.38	(3,787.91)	1,881.39	
2025002292	09216078	RE	2025	LOWE'S, HOME CENTERS INC	6/19/2026	**Value**	2,233,200	1,711,400	(521,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	19,522.63	14,961.06	(4,561.57)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	19,522.63	14,961.06	(4,561.57)	2,265.65	
2025002294	09216088	RE	2025	LOWE'S HOME CENTERS INC #8	6/19/2026	**Value**	10,834,700	8,307,500	(2,527,200)		CHANGE VALUE DUE TO AN APPEAL
						Tax	94,716.95	72,624.17	(22,092.78)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	94,716.95	72,624.17	(22,092.78)	10,973.10	
2025002326	09256073	RE	2025	WANG, LILY TRUSTEE	6/29/2026	**Value**	465,700	415,300	(50,400)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,071.15	3,630.55	(440.60)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,071.15	3,630.55	(440.60)	218.84	

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Correction Listing Report

Union County

Date Posted between 6/1/2026 and 6/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002264	09261017	RE	2025	SHRI KRISHNA INC	6/15/2026	**Value**	5,100,000	3,800,000	(1,300,000)		CHANGE VALUE DUE TO AN APPEAL
						Tax	44,584.20	33,219.60	(11,364.60)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	44,584.20	33,219.60	(11,364.60)	5,644.60	
2025002287	409323	PP	2025	DOGS DAY OUT GROOMING & PE	6/18/2026	**Value**	25,441	0	(25,441)		TAX CODE CHANGE
						Tax	166.33	0.00	(166.33)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	166.33	0.00	(166.33)	126.46	
2025002261	410883	PP	2025	HUNTINGTON NATIONAL BANK (	6/12/2026	**Value**	39,795	0	(39,795)		CLERICAL ERROR
						Tax	300.89	0.00	(300.89)		
Public Notes:						**LL**	30.09	0.00	(30.09)		
						INT	0.00	0.00	0.00		
						Tax TTL	330.98	0.00	(330.98)	0.00	
2025002250	584752	PP	2025	CHARANDA OF SUN VALLEY LLC	6/8/2026	**Value**	319,651	0	(319,651)		DUPLICATE ASSESSMENT
						Tax	2,089.88	0.00	(2,089.88)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,089.88	0.00	(2,089.88)	0.00	
2025002276	625833	PP	2025	RILEY, CLARENCE FRANKLIN	6/16/2026	**Value**	20,664	0	(20,664)		CLERICAL ERROR
						Tax	180.64	0.00	(180.64)		
Public Notes:						**LL**	18.06	0.00	(18.06)		
						INT	0.00	0.00	0.00		
						Tax TTL	198.70	0.00	(198.70)	0.00	
2025002266	644827	PP	2025	THOMPSON, RONALD JAY JR	6/15/2026	**Value**	1,000	0	(1,000)		SOLD PP ASSET
						Tax	4.99	0.00	(4.99)		
Public Notes:						**LL**	0.50	0.00	(0.50)		
						INT	0.00	0.00	0.00		
						Tax TTL	5.49	0.00	(5.49)	0.00	

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Correction Listing Report

Union County

Date Posted between 6/1/2026 and 6/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002340	645011	PP	2025	GUSTINA, KIMBERLY MCKAY	6/30/2026	**Value**	2,708	0	(2,708)		SOLD PP ASSET
Public Notes:						**Tax**	13.53	0.00	(13.53)		
						LL	1.35	0.00	(1.35)		
						INT	0.00	0.00	0.00		
						Tax TTL	14.88	0.00	(14.88)	0.00	
2025002262	647954	PP	2025	DELTA EXPRESS INC	6/12/2026	**Value**	35,483	0	(35,483)		TAXPAYER MOVED
Public Notes:						**Tax**	231.99	0.00	(231.99)		
						LL	23.20	0.00	(23.20)		
						INT	0.00	0.00	0.00		
						Tax TTL	255.19	0.00	(255.19)	0.00	
2025002263	657962	PP	2025	L3K HOLDINGS INC	6/15/2026	**Value**	32,060	0	(32,060)		BUSINESS CLOSED
Public Notes:						**Tax**	246.93	0.00	(246.93)		
						LL	24.69	0.00	(24.69)		
						INT	0.00	0.00	0.00		
						Tax TTL	271.62	0.00	(271.62)	0.00	
2025002269	658034	PP	2025	AMERICAN EAGLE TRANSPORT L	6/15/2026	**Value**	146,700	0	(146,700)		CLERICAL ERROR
Public Notes:						**Tax**	681.57	0.00	(681.57)		
						LL	68.16	0.00	(68.16)		
						INT	0.00	0.00	0.00		
						Tax TTL	749.73	0.00	(749.73)	847.21	
2025002273	658424	PP	2025	TRACHEV, ILYA	6/15/2026	**Value**	120,399	29,142	(91,257)		CLERICAL ERROR
Public Notes:						**Tax**	587.79	142.27	(445.52)		
						LL	58.78	14.23	(44.55)		
						INT	0.00	0.00	0.00		
						Tax TTL	646.57	156.50	(490.07)	0.00	
2025002275	658431	PP	2025	TKACHEV, ILYA	6/15/2026	**Value**	100,335	28,696	(71,639)		CLERICAL ERROR
Public Notes:						**Tax**	489.84	140.09	(349.75)		
						LL	48.98	14.01	(34.97)		
						INT	0.00	0.00	0.00		
						Tax TTL	538.82	154.10	(384.72)	0.00	

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Correction Listing Report

Union County

Date Posted between 6/1/2026 and 6/30/2026

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002274	658524	PP	2025	TRACHEV, ILYA	6/15/2026	**Value**	120,520	39,646	(80,874)		CLERICAL ERROR
						Tax	588.38	193.55	(394.83)		
Public Notes:						**LL**	58.84	19.36	(39.48)		
						INT	0.00	0.00	0.00		
						Tax TTL	647.22	212.91	(434.31)	0.00	
2025002277	658809	PP	2025	NEST TRUCKING LLC	6/16/2026	**Value**	26,015	16,515	(9,500)		SOLD PP ASSET
						Tax	174.14	110.55	(63.59)		
Public Notes:						**LL**	17.41	11.06	(6.35)		
						INT	0.00	0.00	0.00		
						Tax TTL	191.55	121.61	(69.94)	0.00	
2025002272	667278	PP	2024	PETTUS, BARBARA FUTCH	6/15/2026	**Value**	22,618	1,103	(21,515)		TAXPAYER MOVED
						Tax	151.20	7.37	(143.83)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	151.20	7.37	(143.83)	0.00	
2025002260	668390	PP	2024	KELLEY, TERRY BRAD & KELLEY, TONI REBECCA	6/12/2026	**Value**	6,675	0	(6,675)		DUPLICATE ASSESSMENT
						Tax	72.79	0.00	(72.79)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	72.79	0.00	(72.79)	0.00	
2025002268	670284	PP	2025	ANCELIN, ANNE ELIZABETH	6/15/2026	**Value**	59,983	0	(59,983)		TAXPAYER MOVED
						Tax	524.37	0.00	(524.37)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	524.37	0.00	(524.37)	260.45	
2025002267	673420	PP	2025	SWINK, WILLIAM ARMANDO	6/15/2026	**Value**	9,771	0	(9,771)		TAXPAYER MOVED
						Tax	85.42	0.00	(85.42)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	85.42	0.00	(85.42)	0.00	

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Correction Listing Report

Union County

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002259	675470	PP	2025	THOMAS, TABITHA LYNZEE	6/12/2026	**Value**	62,708	0	(62,708)		TAXPAYER MOVED
						Tax	302.00	0.00	(302.00)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	302.00	0.00	(302.00)	0.00	
2025002271	676458	PP	2025	THOMPSON, TAYLOR NATHANIEL	6/15/2026	**Value**	11,358	1,802	(9,556)		TAXPAYER MOVED
						Tax	99.29	15.75	(83.54)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	99.29	15.75	(83.54)	0.00	
2025002253	676459	PP	2025	VANG, CEEB TSHEEJ ELDEN	6/9/2026	**Value**	51,068	0	(51,068)		TAXPAYER MOVED
						Tax	446.44	0.00	(446.44)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	446.44	0.00	(446.44)	0.00	
2025002254	676876	PP	2025	GORE, JACKIE HAMILTON & MILLER, MARY BROWN	6/9/2026	**Value**	28,960	0	(28,960)		SOLD PP ASSET
						Tax	187.34	0.00	(187.34)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	187.34	0.00	(187.34)	0.00	
2025002286	677115	PP	2025	HENRY, BRYAN DAVID	6/18/2026	**Value**	143,530	0	(143,530)		TAXPAYER MOVED
						Tax	717.08	0.00	(717.08)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	717.08	0.00	(717.08)	0.00	
2025002255	677180	PP	2025	MCCAIN, TIMOTHY LEE	6/9/2026	**Value**	25,500	0	(25,500)		TAXPAYER MOVED
						Tax	196.40	0.00	(196.40)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	196.40	0.00	(196.40)	0.00	

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Union County

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2025002333	677449	PP	2025	PENDRI, ANVESH REDDY	6/29/2026	**Value**	24,083	0	(24,083)		TAXPAYER MOVED
Public Notes:						**Tax**	155.79	0.00	(155.79)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	155.79	0.00	(155.79)	0.00	
2025002324	678404	PP	2025	SANGHANI, NIRU RAMNIK	6/29/2026	**Value**	77,492	0	(77,492)		TAXPAYER MOVED
Public Notes:						**Tax**	516.02	0.00	(516.02)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	516.02	0.00	(516.02)	0.00	
				Totals for Type Value Change - Release :		**Value**	**72,598,917**	**55,469,404**	**(17,129,513)**		
						Tax	**570,690.06**	**438,556.78**	**(132,133.28)**		
						LL	**350.06**	**58.66**	**(291.40)**		
						INT	**0.00**	**0.00**	**0.00**		
						Tax TTL	**571,040.12**	**438,615.44**	**(132,424.68)**	**84,438.46**	

Grand Totals :

Year	Refund Amount
	84,438.46

Value	**104,874,799**	**105,582,497**	**707,698**	
Tax	**827,375.40**	**816,356.94**	**(11,018.46)**	
LL	**8,600.12**	**48,835.75**	**40,235.63**	
INT	**0.00**	**2,363.44**	**2,363.44**	
Tax TTL	**835,975.52**	**867,556.13**	**31,580.61**	**84,438.46**

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File #: 26-382 **Agenda Date:** 7/20/2026

TITLE:

Contract - Union County Food Innovation Center Natural Gas Main Extension Agreement

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:

1) April 3, 2023, Regular Meeting, Agenda Item #23-195 - Public Hearing Held
2) April 3, 2023, Regular Meeting, Agenda Item #23-198 - Adopted Budget Amendment BA20 and CPO#344
3) May 1, 2023, Regular Meeting, Agenda Item #23-261 - Approved Construction Manager at Risk Construction Delivery Method
4) January 16, 2024, Regular Meeting, Agenda Item #24-045 - Approved Design Contract with CPL, adopted Budget Amendment BA21 and CPO#344A, and accepted State Grant Funding
5) June 17, 2024, Regular Meeting, Agenda Item #24-416 - Approved Construction Manager at Risk Preconstruction Services Agreement
6) June 17, 2024, Regular Meeting, Item #24-427 - Approved Resilient Food Systems Infrastructure Program Grant application
7) June 17, 2024, Regular Meeting, Agenda Item #24-428 - Approved Golden Leaf Foundation Grant application
8) November 18, 2024, Regular Meeting, Agenda Item #24-769 - Approved NCDA Agriculture Development and Farmland Preservation Trust Fund Grant application
9) January 21, 2025, Regular Meeting, Agenda Item #25-021 - Approved design contract amendment with CPL
10) March 17, 2025, Regular Meeting, Agenda Item #25-128 - Approved grant application North Carolina Tobacco Trust Fund Commission
11) March 17, 2025, Regular Meeting, Agenda Item #25-129 - Approved executing documents related to Golden Leaf Foundation Grant award, adopted CPOs 288F, 344B, and 369A, Budget Amendment BA27
12) February 17, 2026, Regular Meeting, Agenda Item #26-105 - Authorized intergovernmental agreement with Wingate related to administering Food Innovation Center and Approved Guaranteed

Maximum Price contract amendment.
13) March 13, 2026, Regular Meeting, Agenda Item #26-163 - Authorized the County Manager to submit a grant application with the North Carolina Manufacturing and Processing Initiative for an automated bottling system for the Food Innovation Center.

BACKGROUND:

The Union County Food Innovation Center is, as a concept, a Food Systems Strategic Initiative. In an effort to support Union County agricultural producers with a focus on creating a sustainable and all encompassing "Food System," the project is intended to accomplish the following:

- Generate markets for crops and protein-based products harvested within Union County
- Provide career opportunities in an area of the County that has fewer local prospects
- Enable educational partnerships and internships with Wingate University, South Piedmont Community College and John & Wales University
- Promote healthier eating by the residents of Union County
- Support organizations, such as Meals on Wheels, The Food Hub, and others that assist the County's at-risk population

The Food Innovation Center’s primary asset is the Kitchen which will be a multi-purpose facility to serve a dual mission. First, to support the farm community with raw product storage, packaging and/or preparation for wholesale. Secondly, to enable the public and small businesses who need value-added processing, cooking and final packaging which directly serves the consumer market. The proposed facility would house kitchen spaces, as well as freezer, refrigeration, and dry storage space to support raw food preparation and general food processing.

The Food Innovation Center does not currently have access to natural gas service. To provide natural gas service to the facility, the City of Monroe must extend an existing natural gas main to the project site. Monroe has provided a cost estimate of $164,741.69 for the natural gas main extension.

FINANCIAL IMPACT:

Funding is available within the adopted Capital Account 40080187 to support the contract amount of $164,741.69.

STATE OF NORTH CAROLINA

AGREEMENT

COUNTY OF UNION

1. **AGREEMENT**. This agreement ("Agreement") is entered into on _____, by and between UNION COUNTY, a political subdivision of the State of North Carolina ("Union"), and the CITY OF MONROE, a municipal corporation organized under the laws of the State of North Carolina ("Monroe"), with an address of 300 West Crowell Street, Monroe, NC 28112.

2. **SCOPE OF THE WORK.** Monroe shall furnish all labor, equipment, tools, materials, supplies, transportation, tests and supervision required to complete in a workmanlike manner the gas main extension to Union County's Food Innovation Center as described in the letter dated July 2, 2026 and proposed utility corridor, which is attached hereto and incorporated herein by reference as Exhibit A ("Work").

3. **PERIOD OF PERFORMANCE.** This Agreement shall commence as of the date first written above and shall continue until the completion of the Work. Monroe shall make every reasonable effort to promptly commence Work and achieve final completion of the Work by February 26, 2027. Work to commence upon Monroe's receipt of payment from Union.

4. **PAYMENT FOR WORK.** Monroe estimates that the cost of the gas main extension contemplated by this Agreement will be $164,741.69 (the "Estimated Cost"). Union shall pay the Estimated Cost to Monroe upon execution of this Agreement. In the event the actual cost of the Work is expected to exceed the Estimated Cost, Monroe shall promptly notify Union in writing. Union shall have no obligation to pay any amount in excess of the Estimated Cost unless the Parties execute a written amendment to this Agreement authorizing the additional expenditure. All payments shall be conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.

5. **LICENSING REQUIREMENTS.** Monroe represents and warrants that it is and shall remain properly licensed at all times in the performance of Work.

6. **PERMITS AND LICENSES.** Unless otherwise agreed in writing in advance by Union, Monroe shall obtain and pay for all licenses and permits that are required for it to perform Work.

7. **COMPLIANCE WITH LAWS.** In performing the services pursuant to this Agreement, Monroe shall comply with all laws, rules, regulations, ordinances, codes, standards, and orders of any and all governmental bodies, agencies, authorities, and courts having jurisdiction.

8. **LIABILITY.** Nothing contained in this Agreement shall be deemed to waive any defense or immunity available to either Party under North Carolina law, including governmental immunity. Each party shall be responsible for its own acts and omissions. No workers' compensation insurance shall be obtained by Union concerning Monroe or the employees of Monroe. Monroe shall comply with the workers' compensation law concerning Monroe and the employees of Monroe.

9. **WARRANTY OF WORK.** Monroe warrants that all Work shall be new, unless otherwise agreed in this Agreement, and of good quality and performed in a good and workmanlike manner. Monroe shall, at its own expense, at the request of Union, promptly replace or repair any defective or deficient Work for a period of one year after completion of Work. The express warranty contained in this section shall not diminish any of Union's rights against Monroe with respect to the time within which proceedings may be commenced to establish Monroe's liability with respect to Monroe's obligations other than specifically to correct Work.

10. **SAFETY.** Monroe shall establish and enforce safe working procedures at all times during its performance of Work in accordance with all federal, state and local laws, ordinances, rules and regulations pertaining to safety.

11. **AGE LIMITS.** No employee of Monroe under the age of 18 shall be permitted on property owned or leased by Union except that interns or others under the age of 18 may be on the work site when properly supervised and covered by insurance.

12. **CLEANUP.** Monroe shall keep the Project site reasonably free from accumulations of waste materials and debris resulting from the Work and shall, upon completion of the Work, remove any excess materials, equipment, and debris. Monroe shall restore any Union property disturbed by the work to a condition reasonably comparable to that existing prior to commencement of the Work, ordinary wear and tear excepted.

13. **DEFAULT/TERMINATION.** If either Party materially breaches this Agreement, the non-breaching Party shall provide written notice describing the breach. The breaching Party shall have thirty (30) days after receipt of such notice to cure the breach. If the breach is not timely cured, the non-breaching Party may terminate this Agreement and pursue any remedies available under North Carolina law or equity. In the event of termination, the Parties shall cooperate in good faith to determine the amount of Union's payment, if any, to be returned to Union, considering costs reasonably incurred by Monroe in connection with the Project.

14. **ASSIGNMENT.** Neither this Agreement, nor any payments to be earned pursuant to this Agreement, may be assigned by Monroe without the prior written consent of Union. Notwithstanding, Monroe is authorized to assign or subcontract any of its rights or duties hereunder as long as Monroe ensures that the assignee or subcontractor satisfies all requirements of this Agreement, including, but not limited to, maintenance of insurance coverage consistent with the Work being performed.

15. **NO WAIVER.** Union's not insisting upon strict compliance with any of the provisions of this Agreement, or not exercising any of its options provided herein, shall not be construed as a waiver of its right thereafter to require such compliance or to exercise any such options.

16. **E-VERIFY.** E-Verify is the federal program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program, used to verify the work authorization of newly hired employees pursuant to federal law. Monroe shall ensure that Monroe and any subcontractor performing work under this Agreement: (i) uses E-Verify if required to do so by North Carolina law; and (ii) otherwise complies with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.

17. **ENTIRE AGREEMENT.** This Agreement represents the entire agreement of the parties, and may not be modified except in writing signed by both parties.

18. **GOVERNING LAW.** This Agreement shall be construed and enforced in accordance with the laws of the State of North Carolina. The parties to this agreement confer exclusive jurisdiction of all disputes arising hereunder upon the General Courts of Justice of Union County, North Carolina.

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

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

UNION COUNTY

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

CITY OF MONROE

By: _____ (SEAL)
Mark Watson, City Manager

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

_____
Deputy Finance Officer

Approved as to Legal Form _____

July 2nd, 2026

Subject: Union County Food Innovation Center Gas Main Extension Quote

Mr. Bruno:

This letter serves as the cost estimate and invoice for extending the natural gas main down Austin Chaney Road to serve the Union County Food Innovation Center.

Please mail or deliver a check for the estimated amount of **$164,741.69** and a copy of this letter to the City of Monroe Payment Center located at 201 E. Windsor St, Monroe, NC 28112.

Make the check payable to the City of Monroe and designate the amount to be deposited to account number **5601000-381901**.

This estimate must be paid before the work can begin. This estimate is valid for **60 days**. After which, this work will need a new estimate completed, due to possible increases in crew rates and/or material costs.

If you have any questions or concerns, please contact me.

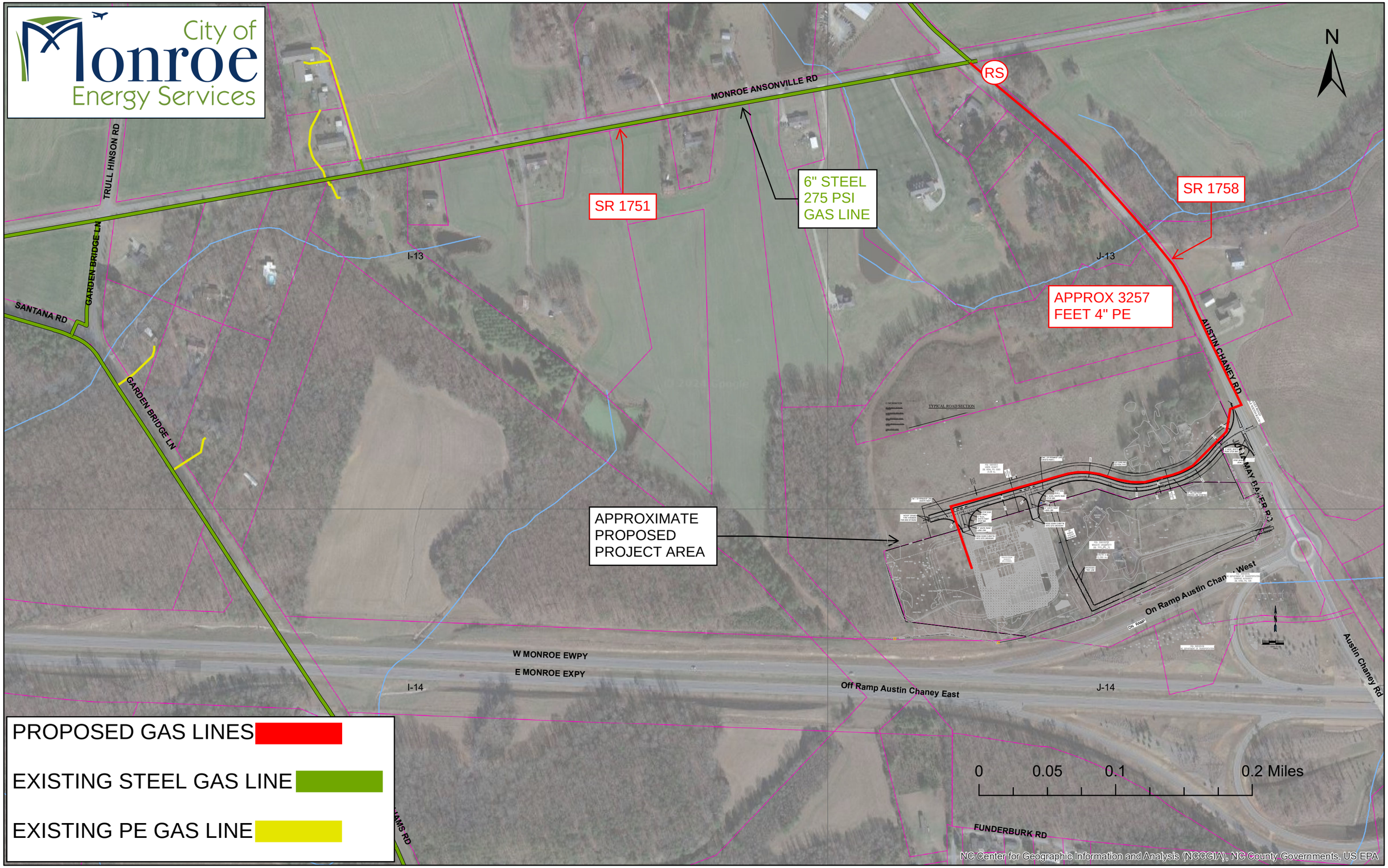
Kind regards,

Caleb Padgett

City of Monroe Energy Services Department
Natural Gas Engineering & Compliance
(C): (980) – 347 – 7405
(O): (704) – 282 – 4794

2201 Walkup Ave
Monroe, NC 28110

Exhibit A


City of Monroe Energy Services
MONROE ANSONVILLE RD
TRULL HINSON RD
GARDEN BRIDGE LN
SANTANA RD
GARDEN BRIDGE LN
I-13
J-13
SR 1751
6" STEEL
275 PSI
GAS LINE
RS
SR 1758
APPROX 3257
FEET 4" PE
AUSTIN CHANEY RD
N
APPROXIMATE
PROPOSED
PROJECT AREA
W MONROE EWPY
E MONROE EXPY
I-14
J-14
Off Ramp Austin Chaney East
On Ramp Austin Chaney West
Austin Chaney Rd
FUNDERBURK RD
PROPOSED GAS LINES
EXISTING STEEL GAS LINE
EXISTING PE GAS LINE
0
0.05
0.1
0.2 Miles
NC Center for Geographic Information and Analysis (NCCGIA), NC County Governments, US EPA

File #: 26-384 **Agenda Date:** 7/20/2026

TITLE:

FY 2027 Capital Project Ordinances - General County, UCPS, and South Piedmont Community College

INFORMATION CONTACT:

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

ACTION REQUESTED:

Adopt the following Capital Project Ordinances for FY 2027:

General Capital Project Ordinances
CPO 273C - Public Safety reduction
CPO 284E - GC Electrical Infrastructure reduction
CPO 288K - Jail Locks, Progress Building/UC Jail Replacement Window reduction
CPO 306F - DOT Projects
CPO 344E - UC Food & Innovation Center
CPO 349E - UC Jail Expansion Phase 1 reduction
CPO 368C - 2025 Critical Infrastructure Amendment
CPO387A - JC Temp Generator Connection reduction
CPO 390- UPS Infrastructure, AV Equipment, and Pictometry
CPO 391 - Annual R&R Funding
CPO 392 - Public Safety

UCPS Capital Project Ordinances for FY 2027
CPO 393 - General Capital

South Piedmont Community College (SPCC) Capital Project Ordinances for FY 2027
CPO 322A - Center for Entrepreneurship
CPO 363B - Tyson Driving Pad
CPO 394 - Modular Building for Faculty Offices
CPO395 - Education Building Design

PRIOR BOARD ACTIONS:

June 16, 2026, Regular Meeting, Agenda Item # 26-351- Board adopted the FY 2027 Operating and Capital Budget Ordinance and the associated tax rates and fees

BACKGROUND:

The FY 2027 Capital Project Ordinances (CPOs) presented for the Board's consideration provide the legal spending authority for capital projects included in the Fiscal Year 2027 Capital Improvement

Program (CIP), which was adopted as part of the FY 2027 Annual Budget Ordinance on June 16, 2025.

The FY 2027 CIP reflects the County's ongoing commitment to maintaining and enhancing public infrastructure, preserving the condition of County-owned facilities, ensuring the reliability and security of technology systems, sustaining public safety operations, and supporting the long-term service capacity of County partner agencies. Projects are organized across multiple program areas and range from recurring renewal and replacement investments to targeted major capital initiatives that advance County priorities.

These appropriations are funded entirely through existing resources, with no new debt issuance required for FY 2027. Funding sources include unassigned General Fund balance, unassigned Debt Fund balance, unallocated CIP Fund reserves, Union EMS Fund balance, and ongoing pay-go capital contributions from both the General Fund and the Education Fund in support of South Piedmont Community College.
Each CPO establishes the project title, total appropriation, and authorized revenue source for a single capital project or program. The individual ordinances are attached to this agenda item for the Board's review. Together, they constitute the full scope of capital spending authority being requested for Fiscal Year 2027.

FINANCIAL IMPACT:

Funding is included in the FY2027 Adopted Budget for all pay go capital funding (cash funded) projects. Unallocated CIP Funding is $3,171,220; Union EMS Fund Balance is $650,000; Pay Go Capital Funding in Education Fund for SPCC is $375,000; General Fund Debt Fund Balance is $610,852; General Fund Unassigned Fund Balance is $2,441,423. Funding for UCPS is Interfund Transfer for General Fund $19,281,471; Mis Revenue $1,063,347; State Public School Building R&R Funds $580,000. Funding for SPCC is $2,116,507 in 2025B Bond Premiums; 2025B GO Bond Interest is $789,000; Pay Go Capital is $2,631,875.

UNION COUNTY, NORTH CAROLINA
2026-2027
CAPITAL PROJECT ORDINANCE #273C

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Sheriff's Office Expansion
Emergency Services Complex
Facilities Repair & Renovation

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment, and the acquisition of interests in real property as required, therefore a reduction in the General Fund in the amount of $97,018 is hereby appropriated, resulting in a revised total cost of $46,066,633.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Transfer from General Fund	$ 1,874,384
GO Bond Proceeds	$ 43,539,059
Investment Earnings from Bond Proceeds	$ 653,633
Total	$ 46,066,633

Section III. The attached CPO #273C chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

Lynn G. West,
Clerk to the Board

Brian Helms, Chair, Union County
Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT from General Fund	1,971,402	(97,018)	1,874,384
General Obligation Bond Proceeds	43,539,059	-	43,539,059
Investment Earnings from Bond Proceeds	653,190	-	653,190
Total	46,163,651	(97,018)	46,066,633

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Sheriff's Office Expansion	27,592,166	(25,680)	27,566,486
Emergency Services Complex	16,461,160	(71,338)	16,389,822
Facitlites R&R	2,110,325	-	2,110,325
Total	46,163,651	(97,018)	46,066,633

EXPLANATION: Redirecting existing project funds to meet the capital needs for FY 2027

DATE: 7/20/2026 APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Sheriff's Office Expansion			
IFT from General Fund 40080080-4010	460,742	(25,680)	435,062
GO Bond Proceeds 40080080-4710	26,969,274	-	26,969,274
Investment Earnings from Bond Proceeds 40080080-4812	162,150	-	162,150
Emergency Services Complex			
Investment Earnings from Bond Proceeds 40080109-4812	491,040	-	491,040
GO Bond Proceeds 40080109-4710	14,859,984	-	14,859,984
IFT from General Fund 40080109-4010	1,110,136	(71,338)	1,038,798
Facitlites R&R			
IFT from General Fund 40080069-4010	400,524	-	400,524
IFT from General Fund 40080069-4710	1,709,801	-	1,709,801
Total	46,163,651	(97,018)	46,066,633

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Sheriff's Office Expansion			
Professional Services 40080080-5381	80,000	-	80,000
Buildings and Improvements 40080080-5580	27,512,166	(25,680)	27,486,486
Emergency Services Complex			
Buildings and Improvements 40080109-5580	16,415,120	(71,338)	16,343,782
Buildings and Improvements 40080109-5015	25,828	-	25,828
Buildings and Improvements 40080109-5714	20,212	-	20,212
Facitlites R&R			
Buildings and Improvements 40080069-5580	2,110,325	-	2,110,325
Total	46,163,651	(97,018)	46,066,633

Prepared By **JBH**
Posted By
Date

Number **CPO - 273C**

UNION COUNTY, NORTH CAROLINA
2026-2027
CAPITAL PROJECT ORDINANCE #284E

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other available funds, for the following projects:

Critical Infrastructure Projects

Agriculture Center - Generator & Infrastructure
Government Center - Electrical Improvements
Radio Towers - HVAC System Replacement (6 Towers)
UC Public Schools Administration Building - Replace Generator
Judicial Center - Generator Replacement
Animal Shelter - Replace UPS System
Government Center - Replace Liebert Unit 3rd Floor Server Room
Judicial Center - Server Room Split System Renewal

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment, and the acquisition of interests in real property as required, therefore a reduction in the amount of $588,625 is hereby appropriated, resulting in a revised project cost of $564,615.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from General Fund	$165,310
GO Bond Proceeds	$399,305

Section III. The attached CPO #284E chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West, Clerk to the Board

_____
Brian Helms
Chairman, Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP Fund** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2026-2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT From General Fund	753,935	(588,625)	165,310
GO Bond Proceeds	399,305	-	399,305
Total	1,153,240	(588,625)	564,615

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Building & Improvements	1,059,240	(588,625)	470,615
Other Equipment	94,000	-	94,000
Total	1,153,240	(588,625)	564,615

EXPLANATION: Redirecting existing project funds to meet the capital needs for FY 2027

DATE: 7/20/2026 APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Agriculture Center - Generator & Infrastructure			
IFT From General Fund 40080146-4010	19,240		19,240
Government Center - Electrical Improvements			
IFT From General Fund 40080142-4010	640,695	(588,625)	52,070
GO Bond Proceeds 40080142-4710	399,305		399,305
Radio Towers - HVAC System Replacement (6 Towers)			
IFT From General Fund 40080169-4010	64,000		64,000
UC Public Schools - Replace Generator			
IFT From General Fund 40080174-4010	-		-
Judicial Center - Generator Replacement			
IFT From General Fund 40080170-4010	-		-
Animal Shelter - Replace UPS System			
IFT From General Fund 40080171-4010	30,000		30,000
Government Center - Replace Liebert Unit 3rd Floor Server Room			
IFT From General Fund 40080147-4010	-		-
Judicial Center - Server Room Split System Renewal			
IFT From General Fund 40080172-4010	-		-
Total	1,153,240	(588,625)	564,615

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Agriculture Center - Generator & Infrastructure			
Building & Improvements 40080146-5580	19,240		19,240
Government Center - Electrical Improvements			
Building & Improvements 40080142-5580	1,040,000	(588,625)	451,375
Radio Towers - HVAC System Replacement (6 Towers)			
Other Equipment 40080169-5550	64,000		64,000
UC Public Schools - Replace Generator			
Other Equipment 40080174-5550	-		-
Judicial Center - Generator Replacement			
Other Equipment 40080170-5550	-		-
Animal Shelter - Replace UPS System			
Other Equipment 40080171-5550	30,000		30,000
Government Center - Replace Liebert Unit 3rd Floor Server Room			
Building & Improvements 40080147-5580	-		-
Judicial Center - Server Room Split System Renewal			
Other Equipment 40080172-5550	-		-
Total	1,153,240	(588,625)	564,615

Prepared By **ga**
Posted By
Date

Number **CPO - 284E**

UNION COUNTY, NORTH CAROLINA
MAJOR INFRASTRUCTURE – 2026-2027
CAPITAL PROJECT ORDINANCE #288K

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other available funds, for the following projects:

Major Infrastructure Projects

Union County Lock Project Enhancements
Union County Jail Block Renovations
Union County Three Commercial Washer & Dryer Replacement
Government Center/Judicial – Building Envelope Repairs
UC Progress Building Renovations
Parks and Recreation Paving
Jesse Helms Park- Park Amenities Improvements
Historic Courthouse Phase 2 Renovation
Main Library Replace Metal Architectural Panels
Cane Creek Park Camp Store
Patton Avenue Radio Shop Renovation
SPCC Building A Renovation Needs
SPCC Camera System
SPCC Access Controls

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, a reduction of $1,102,406 is hereby appropriated for total project cost of $16,460,092.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Federal Grant	$	104,936
2/3rd GO Bond Proceeds	$	5,356,623
2/3rd GO Bond Proceeds Premiums	$	700,966
Interfund Transfer from General Fund	$	4,452,000
Interfund Transfer from EMS Fund	$	64,510
Installment Financing Proceeds	$	5,551,676
Investment Earnings	$	229,381
Total	$	16,460,092

Section III. The attached CPO #288K chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. This capital project ordinance is adopted and effective on the 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms Chair, Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET: **General CIP Fund** | REQUESTED BY: **Brian Matthews**

FISCAL YEAR: **FY 2027** | DATE: **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Federal Grant - 4315	104,936	-	104,936
2/3rd Go Bond Proceeds - 4710	5,356,623	-	5,356,623
2/3rd Go Bond Proceeds Premiums - 4717	700,966	-	700,966
IFT From General Fund - 4010	5,518,916	(1,066,916)	4,452,000
IFT From General Fund/Old EMS Fund - 4020	100,000	(35,490)	64,510
Installment Financing Proceeds - 4730	5,551,676	-	5,551,676
Investment Earnings - 4812	229,381	-	229,381
Total	17,562,498	(1,102,406)	16,460,092

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
General Fund Major Infrastructure Needs	16,675,318	(1,102,406)	15,572,912
SPCC Major Infrastructure Needs	887,180	-	887,180
Total	17,562,498	(1,102,406)	16,460,092

EXPLANATION: Redirecting existing project funds to meet the capital needs for FY 2027

DATE: 7/20/2026

APPROVED BY:

BOCC/County Manager
Lynn West/Clerk to the Board

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
UC Jail - Door Locks and Controls			
IFT From General Fund 40080126-4010	1,170,000	(1,043,669)	126,331
GO Bond Proceeds 40080126-4710	1,585,000	-	1,585,000
GO Bond Proceeds Premiums 40080126-4717	390,848	-	390,848
Investment Earnings 40080126-4812	11,345	-	11,345
UC Jail - Block Renovations			
IFT From General Fund 40080112-4010	824,196	-	824,196
GO Bond Proceeds 40080112-4710	236,928	-	236,928
Parks and Recreation Paving			
IFT From General Fund 40080075-4010	232,460	-	232,460
GO Bond Proceeds 40080075-4710	-	-	-
Historic Courthouse - Phase 2 Renovation			
IFT From General Fund 40080125-4010	1,811,709	-	1,811,709
GO Bond Proceeds 40080125-4710	54,139	-	54,139
Jesse Helms Park - Park Amenities Improvements			
GO Bond Proceeds 40080167-4010	480,500	-	480,500
GO Bond Proceeds 40080167-4710	19,500	-	19,500
Main Library - Replace Metal Architectural Panels			
GO Bond Proceeds 40080156-4710	-	-	-
GO Bond Proceeds Premiums 40080156-4717	-	-	-
IFT From General Fund 40080156-4010	-	-	-
Cane Creek Park - New Camp Store			
GO Bond Proceeds 40080100-4710	850,000	-	850,000
GO Bond Proceeds Premiums 40080100-4717	100,000	-	100,000
Patton Avenue - Radio Shop Renovation			
IFT From General Fund 40080160-4010	-	-	-
GO Bond Proceeds 40080160-4710	-	-	-
UC Jail - Replace 3 Commercial Washers And Dryers			
GO Bond Proceeds 40080173-4710	299,963	-	299,963
IFT From EMS Fund 40080173-4020	100,000	(35,490)	64,510

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
UC Jail - Door Locks and Controls			
Building & Improvements 40080126-5580	3,157,193	(1,043,669)	2,113,524
UC Jail - Block Renovations			
Building & Improvements 40080112-5580	1,061,124	-	1,061,124
Parks and Recreation Paving			
Land and Improvements 40080075-5570	232,460	-	232,460
Historic Courthouse - Phase 2 Renovation			
Building & Improvements 40080125-5580	1,865,848	-	1,865,848
Jesse Helms Park - Park Amenities Improvements			
Building & Improvements 40080167-5580	500,000	-	500,000
Main Library - Replace Metal Architectural Panels			
Building & Improvements 40080156-5580	-	-	-
Cane Creek Park - New Camp Store			
Building & Improvements 40080100-5580	950,000	-	950,000
Patton Avenue - Radio Shop Renovation			
Other Equipment 40080160-5550	-	-	-
UC Jail - Replace 3 Commercial Washers And Dryers			
Other Equipment 40080173-5550	399,963	(35,490)	364,473

Government Center/Judicial Center - Building Envelope Repairs - Phase 1 + 2				**Government Center/Judicial Center - Building Envelope Repairs - Phase 1 + 2**			
IFT From General Fund 40080123-4010	912,935		912,935	Building & Improvements 40080123-5580	1,600,000	-	1,600,000
GO Bond Proceeds 40080123-4710	687,065	-	687,065				
UC Progress Building				**UC Progress Building**			
GO Bond Proceeds 40080159-4710	976,248	-	976,248	Building & Improvements 40080159-5580	6,777,560	(23,247)	6,754,313
Installment Financing Proceeds 40080159-4730	5,551,676	-	5,551,676	Building & Improvements 40080159-5260-14022	131,170	-	131,170
Intergovernmental Revenue 40080159-4280	-	-	-				
IFT From General Fund 40080159-4010	39,518	(23,247)	16,271				
GO Bond Proceeds Premiums 40080159-4717	210,118	-	210,118				
Federal Grant 40080159-4315-14022	104,936	-	104,936				
IFT From General Fund 40080159-4010-14022	26,234	-	26,234				
SPCC Building A Renovation Needs				**SPCC Building A Renovation Needs**			
GO Bond Proceeds 40080093-4710	-	-	-	Payments to Other Governments 40080093-5630	-	-	-
SPCC Camera System				**SPCC Camera System**			
IFT From General Fund 40080161-4010	-	-	-	Payments to Other Governments 40080161-5630	218,036	-	218,036
Investment Earnings 40080161-4812	218,036	-	218,036				
SPCC Access Controls				**SPCC Access Controls**			
IFT From General Fund 40080162-4010	21,364	-	21,364	Payments to Other Governments 40080162-5630	669,144	-	669,144
GO Bond Proceeds 40080162-4710	647,780	-	647,780				
Total	17,562,498	(1,102,406)	16,460,092	Total	17,562,498	(1,102,406)	16,460,092

Prepared By **JBH**
Posted By
Date

Number **CPO - 288K**

UNION COUNTY, NORTH CAROLINA
PLANNING & ZONING – FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #306F

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

NC DOT Projects

including providing capital funding assistance to NC DOT for various construction projects within Union County therefore an additional $300,000 is hereby appropriated for a total project cost of $1,725,000.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from:	
General Fund	$ 1,725,000

Section III. The attached CPO #306F chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____	_____
Lynn G. West,	Brian Helms, Chair
Clerk to the Board	Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP Fund** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
General CIP Fund - Planning & Zoning			
IFT from General Fund	1,425,000	300,000	1,725,000
	-	-	-
Total	1,425,000	300,000	1,725,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
General CIP Fund - Planning & Zoning			
NC DOT Projects	1,425,000	300,000	1,725,000
	-		-
	-		-
	-		-
Total	1,425,000	300,000	1,725,000

EXPLANATION: Appropriate funding for contributions to NC DOT Intersection Projects per FY27 Adopted CIP.

DATE: 7/20/2026 APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
General CIP Fund - Planning & Zoning			
NC DOT Projects			
IFT from General Fund	1,125,000		1,125,000
40080098-4010			
NC DOT Projects			
IFT from General Fund	300,000		300,000
40080098-4010-52026			
IFT from General Fund		300,000	300,000
40080098-4010-52027			
Total	1,425,000	300,000	1,725,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
General CIP Fund - Planning and Zoning			
NC DOT Projects			
Payment to Other Gov't Agencies	1,125,000		1,125,000
40080098-5630			
NC DOT Projects			
Payment to Other Gov't Agencies	300,000		300,000
40080098-5630-52026			
Payment to Other Gov't Agencies		300,000	300,000
40080098-5630-52027			
Total	1,425,000	300,000	1,725,000

Prepared By **KG**
Posted By
Date

Number **CPO - 306F**

UNION COUNTY, NORTH CAROLINA
2026- 2027
CAPITAL PROJECT ORDINANCE #322A

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

SPCC Center for Entrepreneurship

Including the acquisition and construction of a new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, an addition of $2,349,559 is hereby added for a total project cost of $35,074,559.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

General Obligation Bond Proceeds	$32,725,000
2025B GO Bond Premiums	$2,116,507
2025B GO Bond Interest	$233,052

Section III. The attached CPO #322A chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms
Chair, Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **SPCC CIP** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
GO Bond Proceeds	32,725,000	-	32,725,000	SPCC - Center for Entrepreneurship	32,725,000	2,349,559	35,074,559
2025B Bond Premiums	-	2,116,507	2,116,507		-		
2025B Bond Interest	-	233,052	233,052				
Total	32,725,000	2,349,559	35,074,559	**Total**	32,725,000	2,349,559	35,074,559

EXPLANATION: Adding Funding to the SPCC Center for Entrepreneurship from 2025 B Bond Premiums and Interest

DATE: APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
SPCC - Center for Entrepreneurship				**SPCC - Center for Entrepreneurship**			
GO Bond Proceeds 40080183-4710	32,725,000	-	32,725,000	Payments to Other Govt Units 40080183-5630	32,725,000	2,349,559	35,074,559
2025B Bond Premiums 40080183-4717	-	2,116,507	2,116,507				
2025B Bond Interest 40080183-4812		233,052	233,052				
Total	32,725,000	2,349,559	35,074,559	Total	32,725,000	2,349,559	35,074,559

Prepared By **JPM**
Posted By
Date

Number **CPO - 322A**

UNION COUNTY, NORTH CAROLINA
2026-2027
CAPITAL PROJECT ORDINANCE #344E

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Economic Development Food & Innovation Center (previously known as BARN)

Including the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore and additional $500,000 is hereby appropriated for a total of $17,992,641.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Transfer from EDC General Fund	$7,447,087
State Grant Funding	$5,000,000
Golden Leaf Foundation Award	$1,000,000
Transfer from General Fund	$1,482,003
North Carolina Tobacco Trust Fund Grant	$ 500,000
Investment Earnings on Bond Funds	$ 643,396
State Grant Investment Earnings	$ 109,196
Intergovernmental Revenue (Wingate)	$1,810,959

Section III. The attached CPO #344E chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms, Chair
Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General Capital Fund** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
General Capital Fund			-
IFT From EDC General Fund	947,087		947,087
IFT from EDC Fund (from previously issued 2019A bonds and investment earnings)	6,500,000		6,500,000
Investment Earnings on Bond Funds	643,396		643,396
Investment Earnings on State Grant	109,196		109,196
IFT from General Fund	982,003	500,000	1,482,003
Town of Wingate Intergovernmental Revenue for Road	1,810,959		1,810,959
State Grant Funding	5,000,000		5,000,000
Donations - Golden Leaf Award	1,000,000		1,000,000
Donations - NC Tobacco Trust Fund	500,000		500,000
Total	17,492,641	500,000	17,992,641

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
General Capital Fund			
EDC Food Innovation Center (BARN)	17,492,641	500,000	17,992,641
Total	17,492,641	500,000	17,992,641

EXPLANATION: Economic Development Food and Innovation Center (formerly BARN) - appropriate additional equipment funding per the FY27 Adopted CIP

DATE: 7/20/2026 APPROVED BY: _____

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
EDC-BARN Project			
IFT From EDC General Fund 40080187-4010	947,087		947,087
IFT from EDC Fund (from previously issued bonds and investment earnings) 40080187-4010	6,500,000		6,500,000
Investment Earnings on Bond Funds 40080187-4812	643,396		643,396
IFT From General Fund 40080187-4010	982,003	500,000	1,482,003
State Grant Funding (investment earnings) 40080187-4810-11050	109,196		109,196
Town of Wingate Invergovernmental Revenue for Road 40080187-4280	1,810,959		1,810,959
State Grant Funding 40080187-4499-11050	5,000,000		5,000,000
Golden Leaf Award 40080187-4840-11106	1,000,000		1,000,000
NC Tobacco Trust Fund Commission 40080187-4840-11107	500,000		500,000
Total	17,492,641	500,000	17,992,641

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
EDC-BARN Project			
Buildings and Improvements 40080187-5580	10,700,353	500,000	11,200,353
Payments to Other Governmental Agencies (for Lease and Scholarship) 40080187-5630	15,001		15,001
General Manager salary 40080187-5121	106,951		106,951
General Manager 401k reg 40080187-5134	5,348		5,348
General Manager FICA 40080187-5131	8,082		8,082
General Manager Retirement Reg 40080187-5136	15,138		15,138
General Manager SEPA 40080187-5173	4,064		4,064
General Manager Health Insurance 40080187-5183	25,479		25,479
General Manager Dental Ins 40080187-5187	962		962
General Manager Workers Comp 40080187-5182	987		987
General Manager Phone Allowance 40080187-5129	1,080		1,080
Buildings and Improvements - State Grant Funded 40080187-5580-11050	5,021,681		5,021,681
Professional Services - State Grant Funded 40080187-5381-11050	87,515		87,515
Equipment - Golden Leaf Award 40080187-5550-11106	1,000,000		1,000,000
Equipment - NC Tobacco Trust Fund Comm 40080187-5550-11107	500,000		500,000
Total	17,492,641	500,000	17,992,641

Prepared By **KG**
Posted By _____
Date _____

Number **CPO - 344E**

UNION COUNTY, NORTH CAROLINA
FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #349E

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Major Capital:
UC Jail
Judicial Center and Government Administration Facilities
UC Jail Rooftop HVAC Systems

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment, and the acquisition of interests in real property as required, therefore a reduction in the amount of $1,200,000 is hereby appropriated, resulting in a revised project cost of $18,737,214.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from General Fund	$ 3,531,506
Interfund Transfer from Spcl Rev Fund	$ 20,422
GO Bond Proceeds	$14,378,072
2/3rds GO Bond Premiums	$ 807,214

Section III. The attached CPO #349E chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective on this 20th day of July 2026.

ATTEST:

_____
Lynn G. West, Clerk to the Board

_____
Brian Helms, Chair,
Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP Fund** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT from General Fund	3,531,506	-	3,531,506
IFT from Special Revenue Fund	1,220,422	(1,200,000)	20,422
(ARPA Investment Earnings)	-	-	-
GO Bond Proceeds	14,378,072	-	14,378,072
2/3rd Go Bond Premiums	807,214	-	807,214
Total	19,937,214	19,937,214	18,737,214

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Major Capital Projects	18,271,292	-	18,271,292
Land	1,600,000	(1,200,000)	400,000
Lease Exp - Prin & Int	65,922	-	65,922
Total	19,937,214	(1,200,000)	18,737,214

EXPLANATION: Redirecting existing project funds to meet the capital needs for FY 2027.

DATE: 7/20/2026

-

APPROVED BY:

BOCC/County Manager
Lynn West/Clerk to the Board

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
UC Jail			
IFT From General Fund 40080188-4010	1,001,506		1,001,506
IFT From Special Revenue Fund 40080188-4031	1,220,422	(1,200,000)	20,422
GO Bond Proceeds 40080188-4710	1,378,072		1,378,072
Judicial Center and Government Administration Facilities			
IFT From General Fund 40080190-4010	1,800,000	-	1,800,000
2/3rds GO Bond Premiums 40080190-4717	807,214	-	807,214
GO Bond Proceeds 40080190-4710	13,000,000	-	13,000,000
UC Jail Rooftop HVAC Systems			
IFT From General Fund 40080189-4010	730,000	-	730,000
Total	19,937,214	(1,200,000)	18,737,214

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
UC Jail			
Building & Improvements 40080188-5580	2,000,000	-	2,000,000
Land and Improvements 40080188-5570	1,600,000	(1,200,000)	400,000
Judicial Center and Government Administration Facilities			
Building & Improvements 40080190-5550	15,541,292	-	15,541,292
Lease Exp Prin - GASB 87 40080190-5414	59,521	-	59,521
Lease Exp Int - GASB 87 40080190-5415	6,401	-	6,401
UC Jail Rooftop HVAC Systems			
Building & Improvements 40080189-5580	730,000	-	730,000
Total	19,937,214	(1,200,000)	18,737,214

Prepared By **GA**
Posted By
Date

Number **CPO-349E**

UNION COUNTY, NORTH CAROLINA
2026-2026
CAPITAL PROJECT ORDINANCE #363B

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

SPCC Tyson Driving Pad

Including the acquisition and construction of a new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property as required therefore, a reduction in the amount of $2,631,875 is hereby appropriated, resulting in a revised total project cost of $56,685.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Transfer from General Fund	$56,685

Section III. The attached CPO #363B chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms
Chairman, Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **SPCC CIP** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026** <<<<<<

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
General CIP Fund			-	**General CIP Fund**			
IFT from General Fund	2,688,560	(2,631,875)	56,685	Tyson Driving Pad	2,688,560	(2,631,875)	56,685
	-	-	-				-
Total	2,688,560	(2,631,875)	56,685	Total	2,688,560	(2,631,875)	56,685

EXPLANATION: Trasnferring Funding from Driving Pad Project to fund Education Building Design

DATE: APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
General CIP Fund				**General CIP Fund**			
Tyson Driving Pad				**Tyson Driving Pad**			
IFT From General Fund	2,688,560	(2,631,875)	56,685	Payment to Other Gov't Agencies	2,688,560	(2,631,875)	56,685
40080207-4010				40080207-5630			
Total	2,688,560	(2,631,875)	56,685	Total	2,688,560	(2,631,875)	56,685

Prepared By **JPM**
Posted By
Date

Number **CPO - 363B**

UNION COUNTY, NORTH CAROLINA
FACILITIES CRITICAL INFRASTRUCTURE – FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #368C

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Critical Infrastructure:
Progress Building Generator Installation
UC Fueling Stations

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, an addition of $225,000 is hereby appropriated for total project cost of $1,425,000.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from:	
General Fund	$1,425,000

Section III. The attached CPO #368C chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____ _____

Lynn G. West, Clerk to the Board

Brian Helms, Chair
Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP Fund** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT from General Fund	1,200,000	225,000	1,425,000
	-		-
	-		-
Total	1,200,000	225,000	1,425,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Progress Building Generator Installation	525,000		525,000
UC Fueling Stations	675,000	225,000	900,000
	-		-
Total	1,200,000	225,000	1,425,000

EXPLANATION: Critical Infrastructure FY 2027, to increase funding for the UC Fueling Stations project for three locations per the Adopted FY27 CIP.

DATE: 7/20/2026 APPROVED BY:

BOCC/County Manager
Lynn West/Clerk to the Board

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Progress Building Generator Installation			
IFT From General Fund	525,000		525,000
40080209-4010			
UC Fueling Stations			
IFT From General Fund	675,000	225,000	900,000
40080210-4010			
Total	1,200,000	225,000	1,425,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Progress Building Generator Installation			
Building & Improvements	525,000		525,000
40080209-5580			
UC Fueling Stations			
Other Equipment	675,000		675,000
40080210-5550			
Building & Improvements	-	225,000	225,000
40080210-5580			
Total	1,200,000	225,000	1,425,000

Prepared By **KG**
Posted By
Date 7/20/2026

Number **CPO-368C**

UNION COUNTY, NORTH CAROLINA
FACILITIES CRITICAL INFRASTRUCTURE – FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #387A

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Critical Infrastructure:
Judicial Center Temp Generator Connections/Gear

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required, therefore a reduction in the amount of $95,000 is hereby appropriated, resulting in a revised project cost of $0.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from:	
General Fund	$0

Section III. The attached CPO #387A chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____	_____
Lynn G. West,	Brian Helms, Chair
Clerk to the Board	Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP Fund** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
IFT from General Fund	95,000	(95,000)	-	General Fund Critical Infrastructure Needs	95,000	(95,000)	-
			-				
			-			-	-
Total	95,000	(95,000)	-	Total	95,000	(95,000)	-

EXPLANATION: Redirecting existing project funds to meet the capital needs for FY 2027.

DATE: 7/20/2026 APPROVED BY:

BOCC/County Manager
Lynn West/Clerk to the Board

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES				PROJECT USES			
Source Description and Code	Project To Date	Requested Amendment	Revised Project	Project Description and Code	Project To Date	Requested Amendment	Revised Project
Judicial Center Temp Generator Connections/Gear				**Judicial Center Temp Generator Connections/Gear**			
IFT From General Fund 40080229-4010	95,000	(95,000)	-	Building & Improvements 40080229-5580	95,000	(95,000)	-
Total	-	(95,000)	-	Total	95,000	(95,000)	-

Prepared By **ga**
Posted By
Date

Number **CPO-387A**

UNION COUNTY, NORTH CAROLINA
IT INFRASTRUCTURE & ENHANCEMENT PROJECTS – FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #390

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other available funds, for the following projects:

IT Infrastructure & Enhancement Projects
Pictometry Imagery
UPS Infrastructure Upgrades
Audio Visual Equipment

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, $373,495 is hereby appropriated.

Section II. That it is estimated that the following revenues will be available until completion of these projects to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from General Fund	$338,005
Interfund Transfer from EMS Fund	$ 35,490

Section III. The attached CPO #390 chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms, Chair
Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET: **General CIP Fund** | REQUESTED BY: **Brian Matthews**

FISCAL YEAR: **FY 2027** | DATE: **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT From General Fund		338,005	338,005
IFT From EMS Fund		35,490	35,490
Total	-	373,495	373,495

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Pictometry Imagery		203,495	203,495
UPS Infrastructure Upgrades		50,000	50,000
Audio Visual Equipment		120,000	120,000
		-	-
Total	-	373,495	373,495

EXPLANATION: Annual IT Infrastructure & Enhancement Projects for FY 2027: Pictometry Imagery, Audio Visual Equipment, and UPS Infrastructure Upgrades.

DATE: 7/20/2026

APPROVED BY: _____
BOCC/County Manager
Lynn West/Clerk to the Board

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Pictometry Imagery			
IFT From General Fund	-	203,495	203,495
40080198-4010-52027			
AV Equipment			
IFT From General Fund	-	84,510	84,510
40080228-4010-52027			
IFT From EMS Fund	-	35,490	35,490
40080228-4020-52027			
UPS Infrastructure			
IFT From General Fund	-	50,000	50,000
40080168-4010-52027			
Total	-	373,495	373,495

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Pictometry Imagery			
Professional Services	-	203,495	203,495
40080198-5381-52027			
AV Equipment			
Office Furniture & Equip.	-	120,000	120,000
40080228-5510-52027			
UPS Infrastructure			
Other Equipment	-	50,000	50,000
40080168-5550-52027			
Total	-	373,495	373,495

Prepared By **MG**
Posted By
Date

Number **CPO - 390**

UNION COUNTY, NORTH CAROLINA
ANNUAL OPERATING R&R PROJECTS – FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #391

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other available funds, for the following projects:

Annual Operating R&R Projects
Facility Repair and Renovation
Facilities Operating Capital
Parks and Rec Replacement & Renewal
SPCC CIP Funding

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, $2,700,000 is hereby appropriated.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from:	
General Fund	$ 1,500,000
Special Rev Project Fund	$ 1,200,000

Section III. The attached CPO #391 chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms, Chair
Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP Fund**

FISCAL YEAR **FY 2026-2027**

REQUESTED BY **Brian Matthews**

DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT from General Fund	-	1,500,000	
IFT From Special Rev Proj Fund	-	1,200,000	
Total	-	2,700,000	-

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Building & Improvements	-	2,325,000	2,325,000
Payment to Other Gov't Agencies	-	375,000	375,000
Total	-	2,700,000	2,700,000

EXPLANATION: Annual Operating R&R Projects for FY27.

DATE: 7/20/2026

APPROVED BY:

BOCC/County Manager
Lynn West/Clerk to the Board

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Facility Repair and Renovation			
IFT from General Fund 40080069-4010-52027	-	350,000	350,000
IFT From Special Rev Proj Fund 40080069-4031-52027	-	1,200,000	1,200,000
Facility Operating Capital			
IFT from General Fund 40080131-4010-52027	-	425,000	425,000
Parks and Rec R&R			
IFT from General Fund 40080134-4010-52027	-	350,000	350,000
SPCC CIP Funding			
IFT from General Fund 40080067-4010-52027	-	375,000	375,000
	-	-	-
	-	-	-
Total	-	2,700,000	2,700,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Facility Repair and Renovation			-
Building & Improvements 40080069-5580-52027	-	1,550,000	1,550,000
Facility Operating Capital			-
Building & Improvements 40080131-5580-52027	-	425,000	425,000
Parks and Rec R&R			-
Building & Improvements 40080134-5580-52027	-	350,000	350,000
SPCC CIP Funding			-
Payment to Other Gov't Agencies 40080067-5630-52027	-	375,000	375,000
	-	-	-
	-	-	-
Total	-	2,700,000	2,700,000

Prepared By **GA**
Posted By
Date

Number **391**

UNION COUNTY, NORTH CAROLINA
PUBLIC SAFETY PROJECTS – FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #392

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Public Safety:
Radio Replacements & Maintenance
Union EMS Capital FY 2027
VFD Air Packs FY 2027

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, $2,500,000 is hereby appropriated.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from General Fund $ 2,500,000

Section III. The attached CPO #392 chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms, Chair
Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **General CIP Fund** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT from General Fund		2,500,000	2,500,000
			-
			-
Total			2,500,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Public Safety Capital Projects		2,500,000	2,500,000
		-	-
Total		2,500,000	2,500,000

EXPLANATION: Public Safety Capital Projects FY 2027

DATE: 7/20/2026 APPROVED BY:

BOCC/County Manager
Lynn West/Clerk to the Board

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Radio Replacement and Maintenance			
IFT From General Fund		150,000	150,000
40080157-4010-52027			
Union EMS Capital FY 2027			
IFT From General Fund		2,050,000	2,050,000
40080193-4010-52027			
VFD Air Packs FY 2027			
IFT From General Fund		300,000	300,000
40080164-4010-52027			
Total		2,500,000	2,500,000

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Radio Replacement and Maintenance			
Other Equipment		150,000	150,000
40080157-5290-52027			
Union EMS Capital FY 2027			
Payments to Outside Agencies		2,050,000	2,050,000
40080193-5699-52027			
VFD Air Packs FY 2027			
Payments to Outside Agencies		300,000	300,000
40080164-5699-52027			
Total		2,500,000	2,500,000

Prepared By **sw**
Posted By
Date 7/20/2026

Number **CPO-392**

UNION COUNTY, NORTH CAROLINA
UCPS Capital – FISCAL YEAR 2026-2027
CAPITAL PROJECT ORDINANCE #393

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other available funds, for the following projects:

UCPS Capital;
Laptop Lease Payments
Band Uniforms and Equipment
Building Systems
Landscaping Equipment and Vehicles
Expansions and Renovations
Painting
Transportation/Vehicles/Related Equipment

Including the replacement of equipment, the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, $20,924,818 is hereby appropriated.

Section II. That it is estimated that the following revenues will be available until completion of these projects to meet the appropriations in Section I, as set forth in the following schedule:

Interfund Transfer from General Fund	$ 19,281,471
Misc. Revenue – Other Miscellaneous	$ 1,063,347
State Public Schools Building R&R Funds	$ 580,000

Section III. The attached CPO #393 chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

Lynn G. West,
Clerk to the Board

Brian Helms, Chair
Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET: **UCPS CIP Fund** | REQUESTED BY: **Brian Matthews**

FISCAL YEAR: **FY 2026-2027** | DATE: **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
IFT From General Fund	-	19,281,471	19,281,471
Misc Revenue-Other Misc	-	1,063,347	1,063,347
State Public Schools Buildings R&R Fund	-	580,000	580,000
Total	-	20,924,818	20,924,818

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
UCPS Capital	-	20,924,818	20,924,818
Total	-	20,924,818	20,924,818

EXPLANATION: UCPS Capital Needs FY 2027

DATE: 7/20/2026

APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
UCPS 5YR Laptop Lease Pmt			
IFT From General Fund	-	4,195,993	4,195,993
40182316-4010-52027			
FY 2027 UCPS Band Uniforms and Equipment			
IFT From General Fund	-	50,000	50,000
40182394-4010			
FY 2027 UCPS Building Systems			
IFT From General Fund	-	12,167,756	12,167,756
40182390-4010			
Misc Revenue-Other Misc	-	1,063,347	1,063,347
40182390-4895			
Public Schools Capital R&R Lot	-	580,000	580,000
40182390-4256			
FY 2027 UCPS Expansion and Renovations			
IFT From General Fund	-	1,662,479	1,662,479
40182391-4010			
FY 2027 UCPS Painting			
IFT From General Fund	-	492,508	492,508
40182392-4010			
FY 2027 Transportation/Vehicles/Related			
IFT From General Fund	-	150,000	150,000
40182393-4010			
FY 2027 UCPS Landscaping Equip/Vehicles			
IFT From General Fund	-	562,735	562,735
40182395-4010			
Total	-	20,924,818	20,924,818

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
UCPS 5YR Laptop Lease Pmt			
Payments to Other Gov'ts	-	4,195,993	4,195,993
40182316-5630-52026			
FY 2027 UCPS Band Uniforms and Equipment			
Payments to Other Gov'ts	-	50,000	50,000
40182394-5630			
FY 2027 UCPS Building Systems			
Payments to Other Gov'ts	-	13,811,103	13,811,103
40182380-5630			
FY 2027 UCPS Expansion and Renovations			
Payments to Other Gov'ts	-	1,662,479	1,662,479
40182391-5630			
FY 2027 UCPS Painting			
Payments to Other Gov'ts	-	492,508	492,508
40182392-5630			
FY 2027 Transportation/Vehicles/Related			
Payments to Other Gov'ts	-	150,000	150,000
40182393-5630			
FY 2027 UCPS Landscaping Equip/Vehicles			
Payments to Other Gov'ts	-	562,735	562,735
40182395-5630			
Total	-	20,924,818	20,924,818

Prepared By **GA**
Posted By
Date

Number **CPO - 393**

UNION COUNTY, NORTH CAROLINA
2026-2027
CAPITAL PROJECT ORDINANCE #394

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Modular Units for Faculty Office

Including the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, $406,393 is hereby appropriated.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

2025B GO Bond Interest	$406,393

Section III. The attached CPO #394 chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms
Chairman, Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **SPCC CIP** REQUESTED BY **SPCC**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
2025B GO Bond Interest		406,393	406,393
Total	-	406,393	406,393

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Modular Building for Faculty Offices	-	406,393	406,393
		-	
Total	-	406,393	406,393

EXPLANATION: Appropriate funds from 2025B GO Bond Interest to fund Modular Units for Faculty Offices at SPCC

DATE: APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Modular Building for Faculty Offices			
2025B GO Bond Interest	-	406,393	406,393
40080233-4812			
Total	-	406,393	406,393

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Modular Building for Faculty Offices			
Payments to Other Govt Units	-	406,393	406,393
40080233-5630			
Total	-	406,393	406,393

Prepared By **JPM**
Posted By
Date

Number **394**

UNION COUNTY, NORTH CAROLINA
2026-2027
CAPITAL PROJECT ORDINANCE #395

NOW, THEREFORE BE IT ORDAINED BY THE BOARD OF COUNTY COMMISSIONERS OF UNION COUNTY, NORTH CAROLINA:

Section I. That for the purpose of providing funds, together with any other previously appropriated available funds, for the following projects:

Education Building Design

Including the acquisition and construction of new facilities, the acquisition and installation of necessary furnishings and equipment and the acquisition of interests in real property required therefore, $2,781,430 is hereby appropriated.

Section II. That it is estimated that the following revenues will be available during the construction period to meet the appropriations in Section I, as set forth in the following schedule:

Transfer from General Fund	$ 2,631,875
2025B GO Bond Interest	$149,555

Section III. The attached CPO #395 chart is incorporated herein showing appropriations to date, additions as of this capital project ordinance, and the total appropriation.

Section IV. That the finance officer is authorized from time to time to transfer as a loan from the General Fund or unspent County proceeds in the Capital Projects Funds, cash in an amount necessary to meet obligations until such time as financing is arranged, at which time repayment will be made and the finance officer is authorized to sign the Declaration of Official Intent to Reimburse Expenditures as required by Internal Revenue Service regulations.

Section V. That the finance officer is authorized at the time of project completion to close out the capital project and remove it from the general ledger.

Section VI. This capital project ordinance is adopted and effective this 20th day of July 2026.

ATTEST:

_____
Lynn G. West,
Clerk to the Board

_____
Brian Helms
Chairman, Union County Board of Commissioners

CAPITAL PROJECT ORDINANCE AMENDMENT

BUDGET **SPCC CIP** REQUESTED BY **Brian Matthews**

FISCAL YEAR **FY 2027** DATE **July 20, 2026**

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Transfer from General Fund	-	2,631,875	2,631,875
2025B GO Bond Interest		149,555	149,555
Total	-	2,781,430	2,781,430

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Education Building Design	-	2,781,430	2,781,430
		-	
Total	-	2,781,430	2,781,430

EXPLANATION: Adding funds from General Fund and 2025B GO Bond Interest to the Educaiton Buiding Design Project

DATE: APPROVED BY:

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

FOR FINANCE POSTING PURPOSES ONLY

PROJECT SOURCES

Source Description and Code	Project To Date	Requested Amendment	Revised Project
Education Building Design			
Transfer from General Fund	-	2,631,875	2,631,875
40080232-4010			
2025B GO Bond Interest		149,555	149,555
40080232-4812			
Total	-	2,781,430	2,781,430

PROJECT USES

Project Description and Code	Project To Date	Requested Amendment	Revised Project
Education Building Design			
Payments to Other Govt Units	-	2,781,430	2,781,430
40080232-5630			
Total	-	2,781,430	2,781,430

Prepared By **JPM**
Posted By
Date

Number **395**

File #: 26-385 **Agenda Date:** 7/20/2026

TITLE:

Contract - NC Administrative Office of the Courts

INFORMATION CONTACT:

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

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:

June 16, 2026, Regular Meeting, Agenda Item # 26-351 - Board adopted the FY 2027 Operating and Capital Budget Ordinance and the associated tax rates and fees.

BACKGROUND:

Union County has maintained an ongoing partnership with the District Attorney's Office for the 30th Prosecutorial District to support the expeditious disposition of criminal cases involving threats to public safety, consistent with the authority provided under G.S. 7A-64 and G.S. 153A-212.1. This agreement reflects the County's continued commitment to public safety and the effective administration of justice within Union County.
The North Carolina Administrative Office of the Courts (NCAOC) has authorized the District Attorney to hire two Assistant District Attorneys (ADAs) under this arrangement to address the volume of cases involving pretrial jail population that have accumulated on the dockets of the 30th Prosecutorial District. The NCAOC Director has determined that an overwhelming public interest warrants the use of additional prosecutorial resources for the speedy disposition of cases involving a threat to public safety.

Under the proposed agreement, Union County will fund the full personnel and operating costs for both positions, with the NCAOC administering payroll and human resources services on behalf of the District Attorney. The positions will be employees of the District Attorney's Office and will work under the District Attorney's supervision. The agreement term runs from July 1, 2026 through June 30, 2027.

FINANCIAL IMPACT:

The anticipated annual cost for this service is $240,062 and is budgeted accordingly in FY 2027.

NORTH CAROLINA

UNION COUNTY

THIS AGREEMENT is made and entered into, by, and between **Union County**, (hereinafter "the County"); **Pat S. Robison, III**, District Attorney, 30th Prosecutorial District (hereinafter "the District Attorney"); and the **North Carolina Administrative Office of the Courts** (hereinafter "the NCAOC"); (collectively, the "Parties" and individually, a "Party"), effective as of the date the last Party signs below.

WITNESSETH

THAT WHEREAS, the District Attorney has applied to the NCAOC Director, pursuant to G.S. 7A-64, for authority to hire two Assistant District Attorneys to address the pretrial jail population in Union County, whose cases have accumulated on the dockets of Prosecutorial District 30 and the District Attorney's Office is unable to dispose of these cases in a manner to keep the dockets reasonably current;

WHEREAS, pursuant to G.S. 153A-212.1, the County may appropriate funds under contract with the NCAOC for the provision of services for the speedy disposition of cases involving drug offenses, domestic violence, or other offenses involving threats to public safety;

WHEREAS, the County has appropriated funds to implement a program of expediting these cases and has budgeted the annualized sum to pay for the personnel position costs for each position listed in Appendix A, which Appendix A is attached hereto and is incorporated herein as if fully set out;

WHEREAS, the NCAOC Director has found that the District Attorney has made a showing, pursuant to G.S. 7A-64, that the overwhelming public interest warrants the use of additional resources for the speedy disposition of cases involving a threat to public safety within the meaning of that statute;

WHEREAS, the County desires to pay to the NCAOC on behalf of the District Attorney the amounts specified herein for the use by the District Attorney to hire personnel as shown in Appendix A;

WHEREAS, the NCAOC is responsible for administering the receipts and expenditures of the Judicial Branch, including the office of the District Attorney; and

WHEREAS, the Parties hereto have mutually agreed to the terms of this Agreement as hereinafter set out.

NOW THEREFORE, in consideration of the terms and conditions hereinafter set forth, the County does hereby agree to provide funds and the NCAOC agrees to administer the funds on behalf of the District Attorney for the position(s) shown in Appendix A.

THE TERMS AND CONDITIONS OF THIS AGREEMENT ARE AS FOLLOWS:

1. The term of this Agreement shall be for a period of 12 months, beginning on July 1, 2026 and terminating on June 30, 2027.

2. The employee(s) under this Agreement will be the employee(s) of the District Attorney accordingly for all purposes, and shall be hired by and work under the supervision and direction of the District Attorney for the 30th Prosecutorial District.

3. The County will be responsible for paying the personnel and operating costs as budgeted and other related costs that may arise. Any changes in salary shall be communicated in writing to the County, the District Attorney, and the NCAOC. The parties agree to act in good faith to facilitate such budget amendments as may be necessary from time to time. The District Attorney shall provide space and furnishings for their staff positions under this Agreement commensurate with other staff offices. The NCAOC shall provide administrative services (including Human Resources processing and payroll services) pursuant to this Agreement, but shall not contribute funds or be responsible for paying any operating expenses of the project, nor shall the NCAOC or County be responsible for the hiring or supervision of the positions.

4. The County shall provide funds to the NCAOC Chief Fiscal Officer as outlined in Appendix A. Expenses for unemployment, workers compensation and disability claims, as outlined in paragraph 9 below, are unforeseen expenses which are not included in Appendix A and may increase the County's financial obligation above and beyond the base amount indicated in Appendix A, should a claim be filed.

5. All payment of funds must be made electronically via an account with the North Carolina Department of State Treasurer, as established through the NCAOC and the North Carolina Office of the State Controller. After each electronic payment of funds, the County must then notify NCAOC's Cash Management Division via email, NCJC.FSD.CashManagement@nccourts.org, detailing the amount and relevant month for which the payment applies, or by attaching the relevant invoice to the email.

6. The County agrees to provide to the NCAOC all operating costs associated with the position(s) in this Agreement in accordance with annual NCAOC position cost statements supplied by the NCAOC Financial Services Division, as shown in Appendix A. Typical operating costs in NCAOC position cost statements represent expenditures such as transportation, meals and lodging, registration fees, maintenance agreements, general office supplies, telephone service and equipment, personal computer, software, and wiring and installation. Using funds provided by the County, the NCAOC will purchase and maintain all equipment outlined in Appendix A. The County will submit payment upon the receipt of a detailed invoice.

7. If the County fails to pay an invoice within thirty (30) days of receipt, the NCAOC will apply the requisite amount of court facilities fees collected pursuant to G.S. 7A-304 and 7A-305 toward the outstanding invoice amount. If the County chooses to remit payment to the

NCAOC after the court facilities fees have already been applied to the outstanding invoice amount, the NCAOC will reclassify the amount of court facilities fees allocated to the outstanding invoice so that that County will receive its full share of court facilities fees pursuant to G.S. 7A-304 and 7A-305.

8. The County agrees that it will increase the payments under this Agreement by the amount necessary to provide for each of the following increases in the compensation or benefits of any person whose position is funded under this Agreement, with each increase to become effective on the effective date of the relevant increase in compensation or benefits. Should the amounts needed for any increase exceed ten percent (10%) of the total contract amount, the County must agree in writing to any amount in excess of ten percent (10%) of the total contract amount. If the County does not agree in writing to pay the amount in excess of ten percent (10%), then the Parties may terminate this Agreement in accordance with paragraph 11 below.

    a. Any increase in salary due to legislative act, reclassification, in-range adjustment, or longevity

    b. Any increase in salary to which any assistant or deputy clerk is entitled under the pay plan adopted pursuant to G.S. 7A-102

    c. Any legislatively mandated increase in the employer contributions to the North Carolina Teachers' and State Employees' Retirement System or the Consolidated Judicial Retirement System

    d. Any legislatively mandated increase in the employer's premium to provide coverage under the North Carolina Teachers' and State Employees' Major Medical Plan

9. The County agrees to reimburse the NCAOC for any and all costs arising from an unemployment, workers' compensation and/or disability claim submitted by an employee under this Agreement who qualifies for such payments based on his/her duration of employment with the Judicial Branch. The County agrees to reimburse the NCAOC for all costs arising from any such claim that is submitted after the contract period specified in paragraph 1 above, so long as the termination of employment or injury that is the subject of such claim occurred during said contract period. Costs arising from unemployment, workers' compensation and/or disability claims are not included in Appendix A and may result in costs in excess of those outlined in paragraph 4 above. Absent a specific line item in Appendix A for unemployment, workers' compensation, and/or disability costs, such costs may be offset and covered with (i) funds reallocated from other line items, where available; and/or (ii) lapsed salary resulting from vacant positions under this Agreement. Vacant positions under this Agreement may be held vacant for an extended period of time to ensure that there will be a sufficient amount of lapsed salary with which to reimburse the NCAOC for any such claims. This provision does not limit the authority of the Office of the North Carolina Attorney General to represent the NCAOC in any litigation that may arise hereunder. Additionally, the NCAOC may purchase workers' compensation insurance to cover any workers' compensation claims that may be filed in accordance with this Agreement. The County agrees to reimburse the NCAOC for the cost of workers' compensation insurance premiums and deductibles paid by the NCAOC. The NCAOC will send an invoice to the

County for payment of any and all costs arising from an unemployment, workers' compensation and/or disability claim and for insurance premiums and deductibles and the County shall pay any invoice not later than thirty (30) days after the County's receipt of the invoice.

10. The NCAOC and the County shall maintain all appropriate documentation of expenditures under this Agreement for examination by the Office of the State Auditor. The NCAOC shall provide to the County, and the County shall provide to the NCAOC, copies of said documentation upon request.

11. This Agreement may be terminated by the County, the NCAOC, or the District Attorney upon giving sixty (60) days' prior notice in writing or by mutual consent of all parties.

12. It is understood and agreed between the County, the District Attorney, and the NCAOC that the renewal or extension of the payment specified in this Agreement is dependent upon and subject to the allocation, availability, or appropriation of funds by the County.

13. It is understood and agreed between the County, the District Attorney, and the NCAOC that this Agreement is entered into pursuant to G.S. 7A-64 and 153A-212.1, and that nothing in this Agreement shall be construed to obligate the NCAOC to maintain or request funding for positions or services initially provided under this Agreement.

14. This Agreement may be amended by written agreements executed by all Parties, except that if the only change is an increase in positions and corresponding costs, then only the County and the NCAOC need sign the amendment.

15. This Agreement, including Appendix A, is the entire agreement among the Parties and there are no other agreements, oral, written, expressed or implied.

16. This Agreement and any amendments hereto may be executed by facsimile or digital signature, and in counterparts, each of which (including any signature pages) will be deemed an original, but all of which together will constitute one in the same instrument. To the extent signed in handwriting and then delivered by means of electronic transmission in portable document format ("PDF"), shall be treated in all manner and respects as an original agreement or instrument, and shall be considered to have the same force and legal effect as an original signature.

IN WITNESS WHEREOF, the Parties, or their duly authorized representatives, have executed this Agreement as of the Effective Date. The undersigned County Manager agrees to provide the NCAOC with copies of minutes or other documentation authorizing him or her to execute this Agreement on behalf of the County.

UNION COUNTY

BY: _____ Date: _____
County Manager

DISTRICT ATTORNEY
30th PROSECUTORIAL DISTRICT

BY: _____ Date: _____
District Attorney

NORTH CAROLINA ADMINISTRATIVE OFFICE OF THE COURTS

BY: _____ Date: _____
Kesha Howell
NCAOC Chief Operations Officer

Approved as to Form CGR

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

_____
County Finance Director

APPENDIX A

Estimated Contract Costs 2/9/2026

Invoices will be based on actual, not estimated, costs.

Position Title:	FTE	**FTE:**	**Months:**	**SFY:**	
Assistant District Attorney	Annual	**1.00**	**12**	**2027**	
Salary & Longevity	$80,000			**80,000**	3
Social Security	7.65%			**6,120**	
Retirement	25.89%			**20,712**	
Hospitalization	$8,886			**8,886**	
Unemployment	1.0%			**800**	
Workers' Compensation	0.15%			**120**	
Office Supplies				**800**	
Training/Conference Registration Fees				**0**	1
Hardware, Software, Support Services				**1,560**	2
Data Infrastructure				**708**	2
Bar Dues				**325**	
Duty Station Parking				**0**	1
Cell Phone				**0**	1
Travel					
Mileage ($0.67/mile)				**0**	1
Lodging ($95/day)				**0**	1
Per diem ($49/day)				**0**	1
			Total Estimated Cost	**$120,031**	

Position Title:	FTE	**FTE:**	**Months:**	**SFY:**	
Assistant District Attorney	Annual	**1.00**	**12**	**2027**	
Salary & Longevity	$80,000			**80,000**	3
Social Security	7.65%			**6,120**	
Retirement	25.89%			**20,712**	
Hospitalization	$8,886			**8,886**	
Unemployment	1.0%			**800**	
Workers' Compensation	0.15%			**120**	
Office Supplies				**800**	
Training/Conference Registration Fees				**0**	1
Hardware, Software, Support Services				**1,560**	2
Data Infrastructure				**708**	2
Bar Dues				**325**	
Duty Station Parking				**0**	1
Cell Phone				**0**	1
Travel					
Mileage ($0.67/mile)				**0**	1
Lodging ($95/day)				**0**	1
Per diem ($49/day)				**0**	1
			Total Estimated Cost	**$120,031**	
			Grand Total Estimated Cost	**$240,062**	

1 Expenses not anticipated during this fiscal year.
2 Expenses are invoiced regardless of position vacancy status.
3 Budgeted salary; actual salary is determined by NCAOC Human Resources.
4 Stipend only, hardware not available

File #: 26-389 **Agenda Date:** 7/20/2026

TITLE:

FY 2027 Budget - Technical Adjustment to Add and Increase Commercial Site Plan Review Fee

INFORMATION CONTACT:

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

ACTION REQUESTED:

Board of County Commissioners approve the reinstatement and amendment of the commercial site plan review fees as presented, effective upon adoption of the amended fee schedule.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Commercial site plan review is a required element of the County's development review process for non-residential projects. These fees are assessed to recover a portion of the staff time and resources expended in reviewing commercial site plans submitted to the County for approval. The fee structure distinguishes between smaller commercial sites (less than one acre) and larger sites (one or more acres), with the larger category incorporating a per-acre component to reflect the increased complexity and review time associated with larger projects.

Prior to the omission, the fee schedule established the following rates for commercial site plan review:

Category	Previous Fee
Less than 1 Acre	$300.00 per review
1+ Acres	$300.00 plus $50.00 per acre (or portion thereof)

Proposed Action

Staff recommends the Board of County Commissioners approve an amendment to the non-residential review fee schedule to reinstate the commercial site plan review fee category and adopt the following updated fee structure, effective upon adoption:

Category	Proposed Fee
Less than 1 Acre	$400.00 per review
1+ Acres	$400.00 plus $50.00 per acre (or portion thereof)

The proposed base fee increase from $300 to $400 represents a 33% adjustment to the flat-rate component of the fee. The per-acre charge of $50.00 per acre (or portion thereof) for sites of one acre or more is unchanged. This adjustment more accurately reflects the current cost of the review services provided and brings the commercial site plan fees into better alignment with peer jurisdictions and the County's broader cost-recovery objectives.

FINANCIAL IMPACT:

Revenue generated from commercial site plan review fees is recorded in the General Fund. The fiscal impact will vary based on development activity; however, reinstatement and adjustment of this fee is expected to modestly improve cost recovery for Planning and Development Services operations. No additional appropriation is required.

File #: 26-397 **Agenda Date:** 7/20/2026

TITLE:

Update to the Union County Citizen Participation Plan

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt the updated Union County Citizen Participation Plan and 2) authorize the County Manager to execute any documents necessary to implement the updated Citizen Participation Plan.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The U.S. Department of Housing and Urban Development (HUD) requires entitlement communities receiving Community Development Block Grant (CDBG) funds to maintain a Citizen Participation Plan in accordance with 24 CFR 91.105. The Citizen Participation Plan establishes the County's policies and procedures for encouraging citizen participation in the development, review, and amendment of the Consolidated Plan, Annual Action Plans, applications for Section 108 Loan Guarantees, and Consolidated Annual Performance and Evaluation Reports (CAPER).

Union County has prepared updates to the Citizen Participation Plan to ensure continued compliance with HUD regulations, including amendments effective July 16, 2021.

Notice of the updated Citizen Participation Plan was published on June 27, 2026. The required fifteen (15) day public comment period began June 29, 2026, and concludes on July 13, 2026. Copies of the updated Citizen Participation Plan were made available for public review at the Union County Government Center and on the County's website during the public comment period.

All comments received during the public review period will be considered prior to formal adoption of the updated Citizen Participation Plan by the Union County Board of Commissioners.

FINANCIAL IMPACT:

There is no direct financial impact associated with adoption of the updated Citizen Participation Plan.

2026-2030

Union County Citizen Participation Plan



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SECTION I – INTRODUCTION:

Union County is a federal entitlement jurisdiction through the U.S. Department of Housing and Urban Development's (HUD) Community Development Block Grant Program (CDBG). Union County does not currently participate in the HOME Investment Partnership Program (HOME), Emergency Solutions Grants (ESG), and Housing Opportunities for Persons with AIDS (HOPWA), but reserves the right to pursue funding from these or any other potential HUD funding program. Should the County become a participant in any such program, the policies and references in this document related to the CDBG program will also be assumed to apply to those programs.

The County's office of Budget and Grants Management administers the County's Federal Grants including the CDBG program. In accordance with CDBG regulations at 24 CFR § 91.105 for citizen participation, federal entitlement jurisdictions must adopt a Citizen Participation Plan and update the plan on an as needed basis.

The Union County Board of Commissioners adopted its initial Citizen Participation Plan in May 1995. It was last modified in April 2020 in response to the Coronavirus Aid, Relief, and Economic Security (CARES) Act authorizing Emergency Declaration for Citizen Participation to expedite the Amendment Process.

SECTION II – PURPOSE:

The purpose of the Citizen Participation Plan is to provide Union County a guide for citizen involvement in the Federal Entitlement Programs funded through the U.S. Department of Housing and Urban Development (HUD).

The Citizen Participation Plan is designed to serve the following specific purposes:

- To encourage the participation of all residents, community-based and faith-based organizations, social service agencies, housing providers, economic and community development groups, public and private non-profits, businesses, educational and financial institutions, broadband internet service providers, organizations working to narrow the digital divide, emergency management agencies, and land and water management agencies, etc. in the planning and implementation process of the five-year consolidated plan and subsequent annual action plans.
- To present a logical and clear approach to the various components and requirements of the federal entitlement programs.
- To identify the responsible departments or agencies in Union County responsible for administering the Entitlement Programs.
- To clarify and identify opportunities for individual residents, community organizations, and neighborhood groups to work with County officials and staff in developing the five-year consolidated plan, its annual action plan and performance reports indicating the accomplishments of the programs.

- To provide information and the means for citizens, organizations, and other stakeholders to understand and access the federal programs and required regulations.
- To act as guidance for citizen participation, to be used by all agencies, officials, and staff who are responsible for various components of the County's Five-Year Consolidated Plan and Annual Action Plan.

SECTION III – ENCOURAGEMENT OF CITIZEN PARTICIPATION:

Union County has prepared and adopted its Citizen Participation Plan to establish policies and procedures for citizen participation. The Citizen Participation Plan provides for and encourages citizens to participate in the development of a five-year consolidated plan, any substantial amendments to the five-year consolidated plan, annual action plans, and the annual performance and evaluation report. The plan is specifically designed to encourage participation by low-and-moderate income persons, particularly those residents in neighborhoods that are predominantly low-and-moderate income as defined by the County. Union County will take appropriate actions to encourage participation of all citizens, including minorities, the elderly and disabled, and non-English-speaking persons.

Union County also encourages the participation of local and regional institutions, the Continuum of Care, and local private and non-profit organizations, including businesses, philanthropic organizations, housing providers, social service agencies, educational and financial institutions, as well as community-based and faith-based organizations.

The County will encourage participation of residents of publicly assisted housing in the process of developing, implementing, and amending (if necessary) the five-year consolidated plan or annual action plan. The County will work with the local Public Housing Authority (PHA) to reach resident advisory boards, resident councils, and resident management corporations. Other low-income residents of targeted revitalization areas in which public and/or assisted housing is located, will also be encouraged to participate in the five-year consolidated planning process. The County will provide information about the activities included in the five-year plan for the PHA to present at its public hearing for the PHA Plan.

SECTION IV – DEVELOPMENT OF THE FIVE-YEAR CONSOLIDATED PLAN AND ANNUAL ACTION PLAN:

The HUD application for the Community Development Block Grant (CDBG), HOME Investment Partnership Program (HOME), Emergency Solutions Grants (ESG), and Housing Opportunities for Persons with AIDS (HOPWA) is a single document known as the Consolidated Plan. The plan is for a five (5) year period. Each year the County prepares an Annual Action Plan for how it proposes to apply its annual allocation in conformance with the goals and objectives of the Five-Year Consolidated Plan. HUD has consolidated the reporting requirements for these programs into one

annual performance report known as the Consolidated Annual Performance and Evaluation Report (CAPER).

The County's Citizen Participation Plan includes the following requirements for the development of the Five-Year Consolidated Plan as required by federal regulations:

- **Application Development –** Prior to the submission of the Five-Year Consolidated Plan, Annual Action Plan, a Section 108 Loan Guarantee Application, and other applications for CDBG, or other federal funds, and amendments to previously approved plans and applications, the County will notify residents, neighborhood organizations, and other interested parties about the application requirements; eligibility of project activities; timetable for submission; funding amounts; range of activities that may be undertaken; estimated benefit to persons of low-and-moderate income; and other information necessary to involve residents in the development of plans and applications.
- **Program Progress –** Prior to the development of annual application for CDBG funds, the County will report to the public on the progress made on its expenditure of funds at public meetings, public hearings, and through the local news media.
- **Program Implementation –** Resident involvement may take the form of advisory committees, direct involvement, self-help efforts, or other types of citizen participation during the program implementation process. The roles that residents and other stakeholders in the County play in the implementation of CDBG programs include attendance at meetings, calling-in, writing-in, etc.
- **Monitoring Evaluation –** Opportunities for residents to monitor and evaluate the County's CDBG program progress as well as review and comment on the CAPER. The following methods are available: direct contact with staff, direct contact between staff and groups, and direct contact between residents and elected/appointed officials.
- **Submission of Views and Proposals –** The submission of views and proposals, especially from low-and-moderate income persons, minority groups, and other persons or organized groups, can be made on a continuous basis and are encouraged to the greatest extent possible. Submission can be in the form of personal contact, mail, email, and telephone contact; petitions; attendance at public hearings/meetings; through questions and surveys; and other available means. Responses to all submissions shall be in a timely manner and shall not exceed a period of fifteen (15) days after the voicing of the comment, or the date of receipt of a written comment or inquiry.

Individuals submitting comments by mail should use the following mailing address:

Ms. Monica Culbreath
Grants Specialist, Budget and Grants Management
Union County
500 North Main Street
Monroe, NC 28112

Comments by telephone or electronically should use the following:

Phone – (704) 283-3580

Email – Monica.Culbreath@unioncountync.gov

SECTION V – FIVE-YEAR CONSOLIDATED PLAN AND ANNUAL ACTION PLAN AMENDMENTS:

During the course of implementing the Five-Year Consolidated Plan and/or Annual Action Plan, the County may decide to make changes to its approved budget and/or activities. When a substantial change or substantial amendment to the Five-Year Consolidated Plan and/or Annual Action Plan is proposed, the following procedures will be followed.

Definition – Substantial Amendment

- A change to the original purpose for which the activity was selected, including the category of the National Objective selected, the allocation of priorities, or a change in the method of distribution of funds;
- A proposal to undertake a new activity not previously described or approved in the Annual Action Plan;
- A change in the purpose, scope, location, or beneficiaries of a previously approved activity;
- The use of program income that was not previously allocated to an eligible activity;
- The deletion or cancellation of a previously approved project;
- An increase or decrease in the size, scope of work or cost of a project activity by 50% or more of the line-item amount of an approved activity or program;
- A change to the location of the project activity or program from the original proposal, or an increase or decrease to the size of the project service area by 25% or more in size, or a necessary relocation of the activity to another area or site; and/or
- The use of contingency or unprogrammed funds in a given year.

Any proposed change meeting the definition of a substantial amendment shall require amendment of the Consolidated Plan and/or Annual Action Plan, public review and comment, and submission to HUD for review and approval.

Definition – Minor Amendments / Administrative Revisions

The County may make minor amendments or administrative revisions to its approved Five-Year Consolidated Plan and Annual Action Plan when the changes do not substantially alter the purpose, scope, location, beneficiaries, or national objective of the activity. Minor amendments

and administrative revisions are considered administrative in nature and do not constitute substantial amendments.

- Minor amendments or administrative revisions may include line-item budget adjustments, correction of administrative errors, minor schedule changes, funding reallocations between eligible cost categories within an approved activity, and other non-substantial changes necessary for efficient program administration.
- Budget revisions resulting in a cumulative increase or decrease of less than fifty percent (50%) of the approved line-item amount shall be considered a minor amendment or administrative revision and shall not constitute a substantial amendment.
- Minor amendments or administrative revisions shall not require a public hearing, public comment period, or substantial amendment process, provided the change does not meet the definition of a substantial amendment as outlined in this Plan.
- Such revisions may be approved administratively by the Office of Budget and Grants Management and documented internally in the program file.
- Minor amendments and administrative revisions shall remain consistent with all applicable HUD regulations and federal eligibility requirements.
- Revisions will be reported to HUD as required.
- Examples of revisions or minor amendments may include adjustments to engineering, architectural, environmental review, activity delivery, construction, program delivery, or other eligible line-item costs within an already approved project or activity.

Procedure

A description of the substantial amendment to the Five-Year Consolidated Plan or the Annual Action Plan will be published in a local newspaper of general circulation and posted on the County's website. The notice shall indicate the substantial amendment will be on public display for a period of thirty (30) days and a public hearing on the substantial amendment will be held prior to the Union County Board of Commissioners' approval.

SECTION VI – PERFORMANCE REPORTS:

All federal entitlement jurisdictions are required to submit an annual performance report to HUD. HUD requires that a Comprehensive Annual Performance and Evaluation Report (CAPER) be submitted to HUD within ninety (90) days after the end of the Grantee's Fiscal Year. The County Office of Budget and Grants Management will publish in a local newspaper of general circulation and post on the County's website a notice informing the public that the County has prepared the CAPER, and it is available for review and comment for a period of at least fifteen (15) days. The

fifteen (15) day period commences the day after publication of the notice, and the public has fifteen (15) days to make comments prior to the submission of the CAPER.

A summary of the comments or views shall be included in the CAPER. The County Office of Budget and Grants Management will submit the CAPER to the HUD-Greensboro Field Office.

SECTION VII – PUBLIC HEARINGS / MEETINGS:

All public hearings and meetings will be held in a timely manner and shall be accessible to all segments of the County's population, including accommodation for persons with disabilities. The Public Hearings and meetings shall be held at a time and place convenient and accessible to all persons who wish to participate.

Public hearings shall be held at least two (2) times per year at different stages of the program year for the purpose of obtaining residents' views on the development of needs, the review of proposed activities, and review of program performance. The first public hearing is held during the planning process in the development of the Five-Year Consolidated Plan, Annual Action Plan, all Section 108 Loan Guarantee Applications, and other program applications. The second public hearing is held to obtain public comment prior to submission of an application for the above mentioned programs.

The Public Hearing notices shall be published at least ten (10) calendar days prior to the hearing date and shall be advertised in a local newspaper of general circulation.

The first public hearing will serve the purpose of providing a summary of program requirements, answering questions regarding the Annual Action Plan process, provide a tentative schedule for development and submission of the application.

The initial hearing is meant to obtain the views of citizens and organizations regarding overall community development and housing needs, development of proposed activities, including the estimated amount that will benefit persons of low- and moderate-income, and to review program performance.

The intent of the meeting(s) will be to provide a mechanism for citizens participation at the County-wide, municipal and neighborhood level. Comments or recommendations on projects in specific localities will be encouraged.

The hearing will be conducted by the Office of Budget and Grants Management, which is responsible for preparation of the application, in the Board Room of the Union County Government Center, or a similar accessible and suitable location if the Board Room is unavailable.

The Board Room of the Union County Government Center, 500 North Main Street, Monroe N.C. 28112, is accessible to persons with physical disabilities. If special arrangements need to be made to accommodate residents in order for them to participate in the public hearing, please contact Ms. Monica Culbreath, Grants Specialist, Office of Budget and Grants Management at (704) 283-

3580 or Monica.Culbreath@unioncountync.gov. Persons who have a hearing impediment may contact 7-1-1 for the TTY/TTD relay. Generally, requests for assistance should be made at least two (2) working days prior to the hearing day.

Notice of the hearing will appear in the legal section of a newspaper of general circulation within the County. The notice shall be published at least ten (10) days prior to the public hearing.

In the event that non-English speaking residents will be expected to attend public hearings, translation assistance will be provided so they may participate effectively in the hearing. If the Office of Budget and Grants Management is notified within three (3) days prior to the public hearing, it will make arrangements to accommodate non-English speaking residents, including having a translator present at the public hearing or meeting. Also, a summary of the minutes of the public hearing will be translated in another language for the benefit of non-English speaking residents. Alternate language translations of public notices, surveys, etc. will be provided for residents who do not speak or read English.

SECTION VIII – PUBLIC NOTICE:

A legal notice will be published in a local newspaper of general circulation notifying the public that the proposed Five-Year Consolidated Plan and/or Annual Action Plan will be on public display for a period of not less than thirty (30) days, in order to receive citizen comments prior to approval by the governing body.

Copies of the proposed plans will be available at the following locations:

- **Union County Office of Budget and Grants Management**
  500 North Main Street
  Monroe, NC 28112

SECTION IX – AVAILABILITY TO THE PUBLIC:

A second public hearing will be undertaken when the draft application for funding has been prepared.

Upon completion of the proposed Five-Year Consolidated Plan and/or Annual Action Plan, Union County shall publish a draft of the proposed Plan with sufficient time to permit citizens to comment on the Plan prior to its approval and adoption by the County. The notice will appear in the legal section of a local newspaper of general circulation at least thirty (30) calendar days prior to the adoption of the Plan and will include the locations where the Plan will be made available for public review.

The second public hearing will be conducted during the thirty (30) day review period of the proposed Five-Year Consolidated Plan and/or Annual Action Plan. The notice of this second public

hearing will provide locations where the Draft Plan is available for review. The notice will be published at least ten (10) days prior to the date of the hearing.

The hearing will be conducted by the Office of Budget and Grants Management. Public Hearings will be held at times and locations that are convenient to potential and actual beneficiaries of the proposed programs or activities. Public Hearings will be held in the Board Room of the Union County Government Center, 500 North Main Street, Monroe N.C. 28112, or at a similar accessible and suitable location if the Board Room is unavailable. The Draft Five-Year Consolidated Plan or Annual Action Plan will also be posted on the County's website: https://www.unioncountync.gov/.

When planning begins for the upcoming year, organizations within the County will have the opportunity to submit comments, proposals, or recommendations on the Community Development Block Group Program and other Federal Programs. Any residents or property owners in the County or any organization representing County residents or property owners may participate.

Such a comment, proposal or recommendation may be directed to the attention of Ms. Monica Culbreath, Grants Specialist, Union County, Office of Budget and Grants Management, 500 North Main Street, Monroe, NC, 28112 or by email at Monica.Culbreath@unioncountync.gov, or by calling (704) 283-3580. All submitted written statements will receive a written response no later than fifteen (15) working days from the date of receipt, setting forth the action taken or to be taken with respect to the comment, proposal, or recommendation. However, written statements that are intended to suggest modifications to the application can only be considered if they are received before the end of the thirty (30) day review period on the draft Annual Action Plan or Five-Year Consolidated Plan.

SECTION X – ACCESS TO RECORDS:

The County shall provide full public access to the CDBG program information (excepting confidential personal information) and shall conduct affirmative efforts to provide adequate information to residents, especially those who are low-and moderate-income, and those who are residing in predominantly low-and moderate-income neighborhoods or slum and blighted neighborhoods. Information shall be provided about the Community Development Block Grant Program, Section 108 Loan Guarantee Program, and all other programs, as applicable, including at a minimum the following:

- At the time when the County begins its Community Development Block Grant Program, Section 108 Loan planning process, and any other programs, as applicable, include:
    - Total amount of funds available, including program income;
    - The range of activities eligible or ineligible, including the estimated amount which will benefit low-and moderate-income persons;

  - Plans to minimize displacement and assist any person(s) displaced, specifying the type and level of assistance the County will make available to persons displaced, even though the County anticipates no displacement. The Five-Year Consolidated Plan must state when and how the County will make this information available;
  - The process that will be followed in developing and approving projects or programs;
  - The standards of participation and goals for the Citizen Participation Program; and
  - Summary of important program requirements.

- Upon request, copies of all materials relating to the Community Development Block Grant Program and all other programs, as applicable, will be made available to any person and/or group for the cost of copying only, particularly documentation concerning the following:
  - All mailing, promotional materials, and news releases;
  - Key documents, including all prior applications, letters of approval, performance and program evaluation reports, and any other applications proposed or approved, or reports required by HUD;
  - Copies of CDBG Program regulations;
  - Information on contracting and purchasing procedures, environmental policies, fair housing, equal opportunity, relocation provisions, the 24 CFR Part 58 environmental review process, affirmative action and any other requirements or regulations relating to the CDBG programs; and
  - Costs of copying will be established by local and state laws.

- The submission of views and proposals from low-and moderate-income persons, minority groups, and any other persons or organized groups can be on a continuous basis and shall be encouraged to the greatest extent possible. Submissions can be in the form of:
  - Personal contact;
  - Mail, email, and telephone contact;
  - Petitions;
  - Attendance at public meetings/hearings;
  - Through questionnaires and surveys; and
  - Other available means.

- The submission of views and proposals shall be an on-going process and at a minimum during the following stages:
  - The planning process;
  - The annual HUD application process; and
  - The implementation process.

Responses to all submissions shall be in a timely fashion and shall not exceed a period of fifteen (15) days after voicing of a comment, or the date of receipt of a written comment or inquiry.

Individuals submitting comments by mail should use the following mailing address:

Union County Office of Budget and Grants Management
500 North Main Street
Monroe, NC 28112

SECTION XI – TECHNICAL ASSISTANCE:

The Union County Office of Budget and Grants Management shall provide technical assistance to groups/organizations that are representative of persons of low-and-moderate income that request such assistance in developing proposals for funding assistance under any of the programs covered by the County's Five-Year Consolidated Plan.

The County's staff will assist these groups to prepare their proposals and will provide assistance in preparing cost estimates for projects proposed by low-and-moderate-income groups.

SECTION XII – COMPLAINTS:

Any individual or organization may choose to file a complaint concerning Union County's Entitlement Programs. Complaints should be forwarded to Ms. Monica Culbreath, Grants Specialist, Union County, Office of Budget and Grants Management, 500 North Main Street, Monroe, NC, 28112 or by email at Monica.Culbreath@unioncountync.gov, or by calling (704) 283-3580. The complaint should contain the following information.

- The name and signature of the complaint, or if any organization has prepared the complaint, the name and signature of the officer of the organization responsible for correspondence.
- The address to which Union County's response should be mailed.
- A telephone number where the complaint or an individual knowledgeable about the substance of the complaint can be reached during business hours.
- The nature of the complaint, including any relevant information or documentation.
- A recommendation concerning how the complainant wishes to have the matter resolved.

The Office of Budget and Grants Management will make every reasonable effort to provide a written response to a complaint within fifteen (15) days of its receipt. Union County will indicate its position on the matter and the action it proposes to take. The Office of Budget and Grants Management will not be obligated, however, to respond to any anonymous or fictitious complaints.

If the Office of Budget and Grants Management's response does not resolve the problem to the satisfaction of the complainant, the complainant may request a meeting with the County Manager to seek resolution, within two (2) weeks of the initial response by the Office of Budget and Grants Management. This meeting, whenever possible, shall be held within fifteen (15) working days of receipt of the request for a meeting. Following such a meeting the County shall

notify the complainant of its proposed resolution within ten (10) working days of the date of the meeting. If the complainant feels that the response is still not satisfactory, the complainant may follow the procedure described in the following section.

The above complainant procedure shall not be considered a prerequisite for persons or organizations wishing to file objections to applications pursuant to Federal regulations.

Individuals or organizations who have followed the procedure described above to resolve complaints may choose to file an official objection with the U.S. Department of Housing and Urban Development, North Carolina Field Office, 1500 Pinecroft Road, Suite 401, Greensboro, NC 27407. Persons may choose to file a complaint directly with HUD and not follow the local complaint procedure established in #6 above. Following the local complaint procedures is not required prior to filing an objection with HUD. However, citizens are encouraged to bring complaints at the local level for resolution as HUD procedures require the Union County to respond to any complaint filed. Therefore, more immediate resolution to a complaint is generally at the County level.

SECTION XIII – AMENDMENTS TO THE PLAN:

Union County will provide residents with the opportunity to comment on this Citizen Participation Plan. Copies of this proposed Citizen Participation Plan will be available at the Union County, Office of Budget and Grants Management, and the County website https://www.unioncountync.gov/. A public notice will be published in a local newspaper of general circulation for a period of fifteen (15) calendar days prior to the adoption of the Citizen Participation Plan by the County of Union in order for residents to comment on the plan. Copies of the Citizen Participation Plan will be made available upon request, in a format accessible to persons with disabilities. Substantial amendments to this plan will follow the same procedure as the adoption of the original plan.

Revisions, amendments, and changes may be made to the Citizen Participation Plan at any time. Residents will be afforded the opportunity to comment on any amendments to the Citizen Participation Plan. A notice of the proposed amendments to the Citizen Participation Plan will be published in the local newspaper of general circulation in the area, informing the public of the availability of the Citizen Participation Plan and its proposed changes. The County will advertise once and will notify residents that they have a period of up to fifteen (15) days from the date of the newspaper notice to respond to the proposed changes in the Citizen Participation Plan.

SECTION XIV – EMERGENCY DECLARATIONS:

When a Declaration of an Emergency has been ordered by the President of the United States or the Governor of North Carolina and regulatory flexibility is permitted by HUD, the County will adhere to the following process concerning public hearings and public display of plans when necessary for public health reasons. These emergency procedures will apply to the Five-Year

Consolidated Plan, Annual Action Plan, Substantial Amendments, and initial plan submissions, as permitted through a regulatory waiver authority or programmatic flexibility:

- If the County is unable to hold an open public hearing in person, the County will hold virtual public hearings through conference calls or an online video conference platform, as long as the public is able to provide comments during the virtual public hearing.
- If the County is not able to physically place the plans on public display at the locations referenced in the Citizen Participation Plan, the County will place the plans on the County's website (https://www.unioncountync.gov) and will also email copies of the plans to any person who requests a copy of the plans via an email request.
- If the Union County Board of Commissioners is unable to conduct an open public forum meeting, the County may approve the plans at a virtual Union County Board of Commissioners meeting if an in-person meeting will not be held due to the Declaration of an Emergency.
- If HUD has waived the public comment period for the Five-Year Consolidated Plan and Annual Action Plan submission from thirty (30) to a lesser number of days, the public notice will include the number of days in the reduced comment period for public awareness.
- All other requirements relating to the County's Citizen Participation Plan for Five-Year Consolidated Plans and Annual Action Plans remain in effect, including the consultation requirements, as required by 24 CFR 91.105.

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

File #: 26-413 **Agenda Date:** 7/20/2026

TITLE:

Grant Application - The Cannon Foundation

INFORMATION CONTACT:

Jason May, Budget & 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:

Union County Human Services is pursuing a renovation project for the existing group home, which was previously used for other purposes. The group home will serve as a Crisis Stabilization Home for foster youth in Union and Cabarrus Counties, providing short-term housing and supportive services for youth in crisis while staff determine the most appropriate placement and/or treatment plan.

The goal of the project is to prevent foster youth from remaining in Social Services offices by offering a safe, structured environment where services can be quickly wrapped around them during periods of transition. This collaborative effort between Cabarrus County, Union County, Alexander Youth Network, Partners LME/MCO, and BCBS Healthy Blue Care Together represents an innovative, cross-system approach to addressing urgent placement needs. The home will include eight private bedrooms, and with 68% of project funding already secured through state grants, the County is currently working to obtain the remaining funds needed for completion.

The Cannon Foundation seeks to support human services, higher education, healthcare and community. The Cannon Foundation was established in 1943 by Charles A. Cannon, President and CEO of Cannon Mills Company. The Foundation continues his philanthropic legacy by funding capital and equipment projects for organizations across Mr. Cannon’s home state of North Carolina.

FINANCIAL IMPACT:

The grant request will be for approximately $261,729. There is no match required for this grant.

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

File #: 26-420 **Agenda Date:** 7/20/2026

TITLE:

Grant Application - The Braswell Foundation

INFORMATION CONTACT:

Jason May, Budget & 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:

Union County Human Services is pursuing a renovation project for the existing group home, which was previously used for other purposes. The group home will serve as a Crisis Stabilization Home for foster youth in Union and Cabarrus Counties, providing short-term housing and supportive services for youth in crisis while staff determine the most appropriate placement and/or treatment plan.

The goal of the project is to prevent foster youth from remaining in Social Services offices by offering a safe, structured environment where services can be quickly wrapped around them during periods of transition. This collaborative effort between Cabarrus County, Union County, Alexander Youth Network, Partners LME/MCO, and BCBS Healthy Blue Care Together represents an innovative, cross-system approach to addressing urgent placement needs. The home will include eight private bedrooms, and with 68% of project funding already secured through state grants, the County is currently working to obtain the remaining funds needed for completion.

The Braswell Foundation is a private family foundation based in Waxhaw, North Carolina that supports charitable and community-focused initiatives, primarily through grantmaking to local and regional nonprofit organizations.

FINANCIAL IMPACT:

The grant request will be for approximately $261,729. There is no match required for this grant.

File #: 26-387 **Agenda Date:** 7/20/2026

TITLE:

Union County Jail 2026 Bond Referendum Bond Order and Resolution Setting Bond Referendum

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt Bond Order Authorizing the Issuance of $200,000,000 General Obligation Jail Bonds of the County of Union, North Carolina and 2) adopt the Resolution Setting a Special Bond Referendum and Directing the Publication of Notice of a Special Bond Referendum and Notification of the Union County Board of Elections.

PRIOR BOARD ACTIONS:

1) June 16, 2026, Regular Meeting, Agenda Item #26-329 - The Board introduced Bond Order Authorizing the Issuance $200,000,000 General Obligation Jail Bonds of the County of Union, North Carolina and adopted Resolution of the County of Union, North Carolina Regarding Bond Order Authorizing the Issuance of General Obligation Jail Bonds, Setting Public Hearing Thereon and Directing Publication of Notice of Said Public Hearing.
2) May 18, 2026, Regular Meeting, Agenda Item #26-266 - The Board adopted Resolution of the Board of Commissioners of the County of Union, North Carolina directing the Publication of Notice of Intention to apply to the Local Government Commission for approval of $200,000,000 General Obligation Jail Bonds and adopted resolution making Certain statements of facts concerning the proposed jail bond issue and authorizing the application to the Local Government Commission for $200,000,000 of general obligation jail bonds.
3) April 20, 2026, Regular Meeting, Agenda Item #26-212 - The Board authorized staff to move forward with the necessary steps for a 2026 Bond Referendum to fund a new jail facility in the amount of $200,000,000.

BACKGROUND:

General Obligations Bonds (GO) are widely considered the lowest-interest, most cost-effective financing mechanism for long-term capital projects in North Carolina due to the pledge of the local government's full faith, credit, and taxing power. For North Carolina counties, which are legally required to provide secure, safe, and sanitary inmate housing, financing a jail through a GO bond ensures that the borrowing costs are minimized for the taxpayers, as these bonds typically secure better credit ratings than other debt options. The GO bond process is more rigorous than other financing options (requiring a public vote), however the interest savings from a GO bond make it the preferred tool for construction of a new jail.

The Bond Order lays out the purpose of the general obligation bond referendum that will be placed on November 3, 2026, election ballot and the Resolution will set a Special Bond Referendum giving

direction to the Board of Elections for the bond referendum.

FINANCIAL IMPACT:

The estimated cumulative cost over the life of the bond, using the highest interest rate of 5.344% charged for similar debt over the last twenty years is estimated at $312,224,000. The estimated maximum annual debt service payment is $20,688,000 beginning in FY 2028 and commencing in FY 2047. The annual estimated amount of property tax liability increases for each $100,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $31.10. The annual estimated amount of property tax liability increases for each $400,000 of property tax value to service the cumulative cost over the life of the bond is estimated at $124.40 (based on 3.11¢ increase in the ad valorem property tax rate). These estimates are based on the legislative requirements of NC Session Law 2022-53 for bond referendums.

BOND ORDER AUTHORIZING THE ISSUANCE OF $200,000,000 GENERAL OBLIGATION JAIL BONDS OF THE COUNTY OF UNION, NORTH CAROLINA

WHEREAS, the Board of Commissioners of the County of Union, North Carolina (the "County") has ascertained and hereby determines that it is necessary to pay the capital costs of providing for the design, construction, furnishing and equipping of a new jail facility; and

WHEREAS**,** an application has been filed with the Secretary of the Local Government Commission of North Carolina requesting Local Government Commission approval of the General Obligation Jail Bonds hereinafter described as required by the Local Government Bond Act, and the Clerk to the Board of Commissioners has notified the Board of Commissioners that the application has been accepted for submission to the Local Government Commission.

NOW, THEREFORE, BE IT ORDERED by the Board of Commissioners of the County of Union, North Carolina, as follows:

Section 1. In order to raise the money required for the purposes described above, in addition to any funds which may be made available for such purpose from any other source, General Obligation Jail Bonds of the County are hereby authorized and will be issued pursuant to the Local Government Finance Act of North Carolina. The maximum aggregate principal amount of such General Obligation Jail Bonds authorized by this order will be $200,000,000.

Section 2. Taxes will be levied in an amount sufficient to pay the principal and interest of the General Obligation Jail Bonds.

Section 3. A sworn statement of the County's debt has been filed with the Clerk to the Board of Commissioners and is open to public inspection.

Section 4. This bond order will take effect when approved by the voters of the County at a referendum scheduled for November 3, 2026.

READ, APPROVED AND ADOPTED this 20th day of July, 2026.

_____ _____

Clerk to the Board of Commissioners Chairman

APPROVED AS TO FORM:

_____

County Attorney

STATE OF NORTH CAROLINA)
) ss:
COUNTY OF UNION)

I, *Lynn West*, Clerk to the Board of Commissioners of the County of Union, North Carolina, hereby certify that the foregoing is a true and correct extract of minutes of the Board of Commissioners of the County of Union, North Carolina reflecting the holding of public hearing and the adoption of bond order by the Board of Commissioners of the County of Union, North Carolina at a meeting held on the 20th day of July, 2026.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the corporate seal of said County, this the ____ day of July, 2026.

(SEAL)

_____
Clerk to the Board of Commissioners
County of Union, North Carolina

RESOLUTION SETTING A SPECIAL BOND REFERENDUM AND DIRECTING THE PUBLICATION OF NOTICE OF A SPECIAL BOND REFERENDUM AND NOTIFICATION OF THE UNION COUNTY BOARD OF ELECTIONS

WHEREAS, the Board of Commissioners of the County of Union, North Carolina has adopted the following bond order and such bond order should be submitted to the voters of the County of Union, North Carolina for their approval or disapproval in order to comply with the constitution and laws of North Carolina:

> BOND ORDER AUTHORIZING THE ISSUANCE OF $200,000,000 GENERAL OBLIGATION JAIL BONDS OF THE COUNTY OF UNION, NORTH CAROLINA

NOW, THEREFORE, be it resolved by the Board of Commissioners (the *"Board"*) of the County of Union, North Carolina, as follows:

(1) For the purpose of determining the question whether the qualified voters of the County of Union, North Carolina shall approve or disapprove (a) the indebtedness to be incurred by the issuance of the General Obligation Jail Bonds of the County authorized by said bond order, which indebtedness shall be secured by a pledge of the County's full faith and credit and (b) the levy of taxes in an amount sufficient to pay the principal of and interest on the bonds, said bond order shall be submitted to the qualified voters of said County at a special bond referendum to be held in said County on November 3, 2026.

(2) The Clerk to the Board of Commissioners is hereby authorized and directed to publish a notice of said referendum which shall be in substantially the form entitled **"COUNTY OF UNION, NORTH CAROLINA NOTICE OF SPECIAL BOND REFERENDUM."** Said notice of referendum shall be published at least twice. The first publication shall be not less than 14 days, and the second publication shall be not less than 7 days before the last day on which voters may register for the special bond referendum.

(3) The Union County Board of Elections is hereby requested to print and distribute the necessary ballots and to provide the equipment for the holding of said referendum and to conduct and to supervise said referendum.

(4) The ballots to be used at said referendum will indicate that it is being held on behalf of the County of Union, North Carolina and will contain the following words:

"Additional property taxes may be levied on property located in the County of Union, North Carolina in an amount sufficient to pay the principal of and interest on bonds if approved by the following ballot question. Shall the order authorizing $200,000,000 of bonds plus interest to pay the capital costs of providing for the design, construction, furnishing and equipping of a new jail facility and providing that additional taxes may be levied in an amount sufficient to pay the principal of and interest on the bonds be approved, in light of the following:

(1) The estimated cumulative cost over the life of the bond, using the highest interest rate charged for similar debt over the last 20 years, would be

$312,224,000 (consisting of $200,000,000 principal amount of bonds plus $112,224,000 of interest).

(2) The estimated amount of property tax liability increase for each one hundred thousand dollars ($100,000) of property tax value to service the cumulative cost over the life of the bond provided above would be $31.10 per year."

with squares labeled **"YES"** and **"NO"** beneath or beside such words in which squares the voter may record his or her choice on the question presented; and

(5) The Clerk to the Board of Commissioners shall mail or deliver a certified copy of this resolution to the Union County Board of Elections within three days after this resolution is adopted.

BE IT FURTHER RESOLVED that this Resolution shall become effective on the date of its adoption.

READ, APPROVED AND ADOPTED this 20th day of July, 2026.

Clerk to the Board of Commissioners

Chairman

APPROVED AS TO FORM:

County Attorney

STATE OF NORTH CAROLINA)
) SS:
COUNTY OF UNION)

I, *Lynn West*, Clerk to the Board of Commissioners of the County of Union, North Carolina, *DO HEREBY CERTIFY* the attached to be a true and correct copy of a Resolution entitled, **"RESOLUTION SETTING A SPECIAL BOND REFERENDUM AND DIRECTING THE PUBLICATION OF NOTICE OF A SPECIAL BOND REFERENDUM AND NOTIFICATION OF THE UNION COUNTY BOARD OF ELECTIONS"** adopted by the Board of Commissioners of the County of Union, North Carolina at a meeting held on the 20th day of July, 2026.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the corporate seal of said County, this the ____ day of July, 2026.

(SEAL)

Clerk to the Board of Commissioners
County of Union, North Carolina

File #: 26-388 **Agenda Date:** 7/20/2026

TITLE:

NC Department of Public Safety Juvenile Crime Prevention Council Revised Funding Plan FY 2026-2027

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt Revised JCPC County Funding Plan for FY 2026-2027 and 2) authorize the Finance Director to approve the grant agreements and documents related to such grant agreements during their term.

PRIOR BOARD ACTIONS:

June 16, 2026, Regular Meeting, Agenda Item # 26-323 - 1) Approved County Funding Allocation Plan, Annual Plan and Certification for FY 2026-2027, 2) authorized the Finance Director to approve the grant agreements and documents related to such grant agreements during their term, and 3) authorized the County Manager to appropriate JCPC Funding as approved in the funding plan by a County Manager's Budget Amendment in FY 2027.

BACKGROUND:

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

Funding for JCPC programs is generally adopted in the State Budget and assigned to County programs by a formula grant. Normally, a county JCPC approves a budget for the upcoming fiscal year, which is then submitted to the North Carolina Department of Public Safety Juvenile Justice and Delinquency Prevention (the DJJ). The attached funding plan was developed and approved by the JCPC Board and represents the Board's plan for how the funds will be spent for the 2026-2027 fiscal year. This request will be included in the State's DJJ budget which is planned for 2026-2027.

The JCPC Board approved $476,439 for County programs for the 2026-2027 fiscal year. The Funding Plan allocates funding from the State to the following programs: Life Connections D-A-S-H Counseling Services $100,000, Transforming Youth Movement-Transforming Futures $125,000, Transforming Youth Movement- Union County Teen Court Program $40,790, Aspire Youth and Family Kids at Work $75,312, JCPC Administration $9,502, Arts Related Innovative Student Empowerment (ARISE) Union-KRE8IVU $50,000, The Connection Center $45,835, and New Covenant Community Development Center - Next Step Youth Program $30,000.

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

program.

Union County has not approved JCPC programs in line-item detail in the past; rather, the JCPC Board normally negotiates, approves, and monitors line-item detail within the amount of funds allocated to the program, and provides a recommended budget to Commissioners.
The Revised County Funding Plan is updating only the Local in Kind Cash Match for the NCCDC Next Step Youth Program and does require any County funding. This cash match is revenue received directly to NCCDC from other sources.

FINANCIAL IMPACT:

None.

BoldSign Document ID: f8113553-0897-4d31-86cb-df9a04b4e8c7

Union County

NC DPS - Community Programs - County Funding Plan

Available Funds: $ $476,439 Local Match: $ $229,479 Rate: 30%

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

#	Program Provider	DPS-JCPC Funding	LOCAL FUNDING			OTHER	OTHER	Total	% Non DPS-JCPC Program Revenues
			County Cash Match	Local Cash Match	Local In-Kind	State/ Federal	Funds		
1	Life Connections of the Carolinas-DASH Counseling Services	$100,000			$31,689			$131,689	24%
2	Transforming Youth Movement, INC- Transforming Futures	$125,000			$40,000			$165,000	24%
3	Aspire Youth & Family, Inc-Kids At Work! Union	$75,312			$29,388			$104,700	28%
4	Union County-JCPC Administration	$9,502						$9,502	
5	A.R.I.S.E- Union-Kre8ivu	$50,000			$30,000			$80,000	38%
6	The Connect Center	$45,835		$50,502				$96,337	52%
7	Transforming Youth Movement-Union County Teen Court Program	$40,790			$13,000			$53,790	24%
8	NCCDC Next Step Youth Program	$30,000		$2	$34,898			$64,900	54%
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
	TOTALS:	$476,439		$50,504	$178,975			$705,918	33%

The above plan was derived through a planning process by the Union County Juvenile Crime Prevention Council and represents the County's Plan for use of these funds in FY 2026-2027.

Amount of Unallocated Funds _____

Amount of funds reverted back to DPS _____

Discretionary Funds added _____

BoldSign

John Kirkpatrick IV 06/19/2026

Chairperson, Juvenile Crime Prevention Council (Date)

check type ☑ initial plan ☐ update ☐ final

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

Reviewed by Keith B. Brown 6-19-26
Area Consultant Date

Reviewed by Macy Nish 6/19/26
Program Assistant Date

Verified by _____
Designated State Office Staff Date

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

ver 03/02/21

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

File #: 26-393 **Agenda Date:** 7/20/2026

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 to the Union County Pay and Classification Plan:
    A) Adjust the pay grades for the following job classifications:
        i) Deputy Tax Administrator - Pay Grade S
        ii) Director, Utility Business Services - Pay Grade S
    B) Add the following job classifications and associated pay grades:
        i) Recovery Support Coordinator - Pay Grade K
        ii) Elections Program Supervisor - Pay Grade K

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 #: 26-414 **Agenda Date:** 7/20/2026

TITLE:

Resolution - Solid Waste Surplus Equipment Sale

INFORMATION CONTACT:

Corey Brooks, Procurement & Contract Management, 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 his 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 July 23, 2026, at 10:00 AM and end August 6, 2026, at 10:00 AM as indicated on Attachment A. The equipment is to be picked up at 2125 Austin Chaney Road, Wingate, NC 28174 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 vehicle(s) within ten (10) business days from the time and date of issuance of the Buyer’s Certificate.
4. Payment must be made online though 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 $69,000. 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 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 Director of Procurement and Contract Management or his designee be authorized to sell at electronic auction, beginning July 23, 2026, at 10:00 a.m. and ending August 6, 2026, at 10:00 a.m. 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 Director of Procurement and Contract Management or his 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 item(s) within ten business days from the time and date of issuance of the Buyer's Certificate. The equipment is to be picked up at 2125 Austin Chaney Road, Wingate, NC 28174. 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 July, 2026.

ATTEST:

_____ _____

Lynn G. West, Clerk to the Board Brian Helms, Chair

Description	Serial/Parcel	Hours	Department	Auction Start	Auction End
2008 John Deere 544 J Wheel Loader	DW544JP616771	Approx 12000	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
2013 CAT 938K Wheel Loader	CAT0827KESWL00645	Approx 15182	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
1996 Ram Jet Trash Compactor on skids	Unknown	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
FairbanksTruck Scales (3) at 24 ft ea	Unknown	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
40 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
40 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
20 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
40 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
20 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
40 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
30 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
20 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
30 yard Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
20 yard Co-Mingle Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM
20 yard Co-Mingle Roll-Off Box	n/a	n/a	Solid Waste	7/23/2026 at 10:00 AM	8/6/2026 at 10:00 AM

File #: 26-429 **Agenda Date:** 7/20/2026

TITLE:

Resolution - Surplus Vehicle Sale

INFORMATION CONTACT:

Corey Brooks, Procurement & Contract Management, 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 July 23, 2026, at 9:00 AM and end August 6, 2026, 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.

UC Transportation

- (1) 2019 FORD E350 BUS
- (1) 2020 FORD E350 BUS
- (2) 2021 FORD E350 BUS

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 $35,000. 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 July 23, 2026, at 9:00 a.m. and ending August 6, 2026 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 July, 2026

ATTEST:

_____ _____

Lynn G. West, Clerk to the Board Brian Helms, Chair

Tag Number	Description	Serial/Parcel	Mileage	Department	Auction Start	Auction End
84-20	2020 Ford E350 Bus	1FDEE3FS0KDC55515	162,606	Transportation	7/23/26 9:00 AM	8/6/26 9:00 AM
18-21	2021 Ford E350 Bus	1FDEE3FN4MDC20585	185,078	Transportation	7/23/26 9:00 AM	8/6/26 9:10 AM
19-21	2021 Ford E350 Bus	1FDEE3FN8MDC20587	176,546	Transportation	7/23/26 9:00 AM	8/6/26 9:20 AM
90-19	2019 Ford E350 Bus	1FDEE3FS2KDC68606	178,163	Transportation	7/23/26 9:00 AM	8/6/26 9:30 AM

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

File #: 26-401 **Agenda Date:** 7/20/2026

TITLE:

Minutes for Approval

INFORMATION CONTACT:

Lynn G. West, Clerk to the Board, 704-283-3953

ACTION REQUESTED:

Approve minutes.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

File #: 26-362 **Agenda Date:** 7/20/2026

TITLE:

Tax Refunds, Releases and Prorations Approved by Finance Officer

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
ALLEN, BRENDA HELMS	ALLEN, BRENDA HELMS		3501 TROPHY DR		INDIAN TRAIL, NC 28079	Proration	0091184994	RLT1489	AUTHORIZED	868290619	Refund Generated due to proration on Bill #0091184994-2025-2025-0000-00	Other Errors	5/27/2026	5/28/2026	001	TAX	($53.93)	$0.00	($53.93)
															600	TAX	($81.57)	$0.00	($81.57)
															020	TAX	($22.17)	$0.00	($22.17)
															003	TAX	($5.09)	$0.00	($5.09)
															005	TAX	($2.16)	$0.00	($2.16)
															004	TAX	($18.66)	$0.00	($18.66)
															002	TAX	($128.50)	$0.00	($128.50)
																		Refund	$312.08
ALLISON, THAYER STEM JR	ALLISON, THAYER STEM JR	ALLISON, JULIE MERIDEE	2008 IVY POND LN		INDIAN TRAIL, NC 28079	Adjustment < $100	0090653180	WBJ9877	PENDING	1113282117	Refund Generated due to adjustment on Bill #0090653180-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$34.27	$0.00	$34.27
															200	TAX	($88.70)	$0.00	($88.70)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															020	TAX	$9.31	$0.00	$9.31
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$75.12
AMBROSE, ANTHONY JOE	AMBROSE, ANTHONY JOE		2501 TRADING FORD DR		WAXHAW, NC 28173	Proration	0076236251	VCT1874	AUTHORIZED	992332736	Refund Generated due to proration on Bill #0076236251-2025-2025-0000-00	Vehicle Sold	5/27/2026	5/28/2026	001	TAX	($18.20)	$0.00	($18.20)
															500	TAX	($46.96)	$0.00	($46.96)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($7.45)	$0.00	($7.45)
															003	TAX	($1.72)	$0.00	($1.72)
															005	TAX	($0.73)	$0.00	($0.73)
															004	TAX	($6.30)	$0.00	($6.30)
															002	TAX	($43.36)	$0.00	($43.36)
																		Refund	$124.72
ANDRONIK, TATIANA	ANDRONIK, TATIANA		2426 OLD EVERGREEN PKWY		INDIAN TRAIL, NC 28079	Proration	0069867108	KDM5831	AUTHORIZED	742381566	Refund Generated due to proration on Bill #0069867108-2025-2025-0000-00	Vehicle Sold	5/15/2026	5/18/2026	001	TAX	($2.98)	$0.00	($2.98)
															020	TAX	($1.23)	$0.00	($1.23)
															003	TAX	($0.28)	$0.00	($0.28)
															005	TAX	($0.12)	$0.00	($0.12)
															004	TAX	($1.03)	$0.00	($1.03)
															002	TAX	($7.11)	$0.00	($7.11)
																		Refund	$12.75
ANGARITA GONZALEZ, ELANNIE ALEJANDRA	ANGARITA GONZALEZ, ELANNIE ALEJANDRA		1622 SEMINOLE LN		CARPENTERSVILLE, IL 60110	Adjustment < $100	0091232015	MDA7130	PENDING	992258680	Refund Generated due to adjustment on Bill #0091232015-2025-2025-0000	Situs error	5/26/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($17.29)	$0.00	($17.29)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															022	TAX	$2.83	$0.00	$2.83
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$44.46
ARTURO HERNANDEZ PEREZ SVCS	ARTURO HERNANDEZ PEREZ SVCS		4913 W UNIONVILLE INDIAN TRAIL RD		INDIAN TRAIL, NC 28079	Adjustment < $100	0090550760	RLN6155	PENDING	1112966901	Refund Generated due to adjustment on Bill #0090550760-2025-2025-0000	Situs error	5/13/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$5.32	$0.00	$5.32
															200	TAX	($13.77)	$0.00	($13.77)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															023	TAX	$1.34	$0.00	$1.34
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$37.11
BAJIC, ADEM	BAJIC, ADEM		2106 LANDEN CHASE DR		MONROE, NC 28110	Proration	0063535437	JAS6688	AUTHORIZED	864386684	Refund Generated due to proration on Bill #0063535437-2025-2025-0000-00	Vehicle Sold	5/6/2026	5/7/2026	001	TAX	($15.22)	$0.00	($15.22)
															600	TAX	($23.02)	$0.00	($23.02)
															019	TAX	($6.72)	$0.00	($6.72)
															003	TAX	($1.43)	$0.00	($1.43)
															005	TAX	($0.61)	$0.00	($0.61)
															004	TAX	($5.27)	$0.00	($5.27)
															002	TAX	($36.27)	$0.00	($36.27)
																		Refund	$88.54
BAKER, CHETT WRISTON	BAKER, CHETT WRISTON		5726 OLD PAGELAND MARSHVI	MARSHVILLE RD	MONROE, NC 28112	Adjustment < $100	0090453298	WAT9960	PENDING	989584024	Refund Generated due to adjustment on Bill #0090453298-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($50.65)	$0.00	($50.65)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															027	TAX	$6.11	$0.00	$6.11
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$74.54
BARZOFF, DAVID CHARLES	BARZOFF, DAVID CHARLES		1605 PAINTED HORSE DR		INDIAN TRAIL, NC 28079	Proration	0049678019	DLF7899	AUTHORIZED	868290094	Refund Generated due to proration on Bill #0049678019-2025-2025-0000-00	Vehicle Sold	5/27/2026	5/28/2026	001	TAX	($4.02)	$0.00	($4.02)
															600	TAX	($6.09)	$0.00	($6.09)
															023	TAX	($1.53)	$0.00	($1.53)
															003	TAX	($0.38)	$0.00	($0.38)
															005	TAX	($0.16)	$0.00	($0.16)
															004	TAX	($1.39)	$0.00	($1.39)
															002	TAX	($9.59)	$0.00	($9.59)
																		Refund	$23.16

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
BASS, LARRY GENE	BASS, LARRY GENE		PO BOX 116		WAXHAW, NC 28173	Proration	0087957997	LMH9485	AUTHORIZED	868997003	Refund Generated due to proration on Bill #0087957997-2025-2025-0000-00	Vehicle Totalled	5/29/2026	6/1/2026	001	TAX	($10.72)	$0.00	($10.72)
															990	TAX	($1.67)	$0.00	($1.67)
															015	TAX	($4.52)	$0.00	($4.52)
															003	TAX	($1.01)	$0.00	($1.01)
															005	TAX	($0.43)	$0.00	($0.43)
															004	TAX	($3.71)	$0.00	($3.71)
															002	TAX	($25.53)	$0.00	($25.53)
																		Refund	$47.59
BENNETT, JOHN WALTER	BENNETT, JOHN WALTER		226 S MAIN ST	APT B7	WINGATE, NC 28174	Proration	0086928413	VHE5133	AUTHORIZED	989304488	Refund Generated due to proration on Bill #0086928413-2025-2025-0000-00	Vehicle Sold	5/13/2026	5/14/2026	001	TAX	($3.23)	$0.00	($3.23)
															300	TAX	($7.19)	$0.00	($7.19)
															300	VEHICLE FEE	$0.00	$0.00	$0.00
															022	TAX	($2.06)	$0.00	($2.06)
															003	TAX	($0.30)	$0.00	($0.30)
															005	TAX	($0.13)	$0.00	($0.13)
															004	TAX	($1.12)	$0.00	($1.12)
															002	TAX	($7.70)	$0.00	($7.70)
																		Refund	$21.73
BOUDRIE, JASON DOUGLAS	BOUDRIE, JASON DOUGLAS	BOUDRIE, GUNILLA MARAIA	1021 LYDGATE DR		WAXHAW, NC 28173	Proration	0064859053	PBA4993	AUTHORIZED	986458304	Refund Generated due to proration on Bill #0064859053-2025-2025-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($21.38)	$0.00	($21.38)
															500	TAX	($55.16)	$0.00	($55.16)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($8.75)	$0.00	($8.75)
															003	TAX	($2.01)	$0.00	($2.01)
															005	TAX	($0.85)	$0.00	($0.85)
															004	TAX	($7.40)	$0.00	($7.40)
															002	TAX	($50.93)	$0.00	($50.93)
																		Refund	$146.48
BRASWELL, BARBARA JEAN	BRASWELL, BARBARA JEAN		1001 WELLSCROFT RD		INDIAN TRAIL, NC 28079	Proration	0090970638	RLT1328	AUTHORIZED	866698511	Refund Generated due to proration on Bill #0090970638-2025-2025-0000-00	Vehicle Sold	5/18/2026	5/19/2026	001	TAX	($31.32)	$0.00	($31.32)
															600	TAX	($47.37)	$0.00	($47.37)
															023	TAX	($11.90)	$0.00	($11.90)
															003	TAX	($2.95)	$0.00	($2.95)
															005	TAX	($1.26)	$0.00	($1.26)
															004	TAX	($10.84)	$0.00	($10.84)
															002	TAX	($74.63)	$0.00	($74.63)
																		Refund	$180.27
BRASWELL, EDDIE LYNN	BRASWELL, EDDIE LYNN		6610 OLD PAGELAND	MARSHVILLE RD	MARSHVILLE, NC 28103	Proration	0048369284	CL42942	AUTHORIZED	740644626	Refund Generated due to proration on Bill #0048369284-2024-2024-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($0.71)	$0.00	($0.71)
															027	TAX	($0.28)	$0.00	($0.28)
															003	TAX	($0.08)	$0.00	($0.08)
															005	TAX	($0.02)	$0.00	($0.02)
															004	TAX	($0.13)	$0.00	($0.13)
															002	TAX	($1.62)	$0.00	($1.62)
																		Refund	$2.84
BRIDGE TO RECOVERY	BRIDGE TO RECOVERY		2111 STAFFORD STREET EXT		MONROE, NC 28110	Proration	0083767345	CR94737	AUTHORIZED	741107430	Refund Generated due to proration on Bill #0083767345-2024-2024-0000-00	Other Errors	5/7/2026	5/8/2026	001	TAX	($10.79)	$0.00	($10.79)
															200	TAX	($33.23)	$0.00	($33.23)
															003	TAX	($1.16)	$0.00	($1.16)
															005	TAX	($0.26)	$0.00	($0.26)
															004	TAX	($1.93)	$0.00	($1.93)
															002	TAX	($24.75)	$0.00	($24.75)
																		Refund	$72.12
BRIDGE TO RECOVERY	BRIDGE TO RECOVERY		2111 STAFFORD STREET EXT		MONROE, NC 28110	Adjustment < $100	0083767345	CR94737	PENDING	741978600	Refund Generated due to adjustment on Bill #0083767345-2025-2025-0000-00	Exempt Property	5/13/2026		001	TAX	($10.04)	$0.00	($10.04)
															200	TAX	($39.28)	$0.00	($39.28)
															003	TAX	($0.95)	$0.00	($0.95)
															005	TAX	($0.40)	$0.00	($0.40)
															004	TAX	($3.47)	$0.00	($3.47)
															002	TAX	($23.91)	$0.00	($23.91)
																		Refund	$78.05
BROOCKERD, BRONSON CORBETT	BROOCKERD, BRONSON CORBETT	BROOCKERD, CHRISTI LEA	2002 VISCOUNT DR		MATTHEWS, NC 28104	Proration	0047420582	FMZ8034	AUTHORIZED	864085796	Refund Generated due to proration on Bill #0047420582-2025-2025-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($5.06)	$0.00	($5.06)
															600	TAX	($7.65)	$0.00	($7.65)
															026	TAX	($1.37)	$0.00	($1.37)
															003	TAX	($0.48)	$0.00	($0.48)
															005	TAX	($0.20)	$0.00	($0.20)
															004	TAX	($1.75)	$0.00	($1.75)
															002	TAX	($12.05)	$0.00	($12.05)
																		Refund	$28.56
BROOCKERD, CHRISTI LEA	BROOCKERD, CHRISTI LEA	BROOCKERD, BRONSON CORBETT	2002 VISCOUNT DR		MATTHEWS, NC 28104	Proration	0058863771	RBH4327	AUTHORIZED	864085761	Refund Generated due to proration on Bill #0058863771-2025-2025-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($10.11)	$0.00	($10.11)
															600	TAX	($15.28)	$0.00	($15.28)
															026	TAX	($2.73)	$0.00	($2.73)
															003	TAX	($0.95)	$0.00	($0.95)
															005	TAX	($0.40)	$0.00	($0.40)
															004	TAX	($3.49)	$0.00	($3.49)
															002	TAX	($24.08)	$0.00	($24.08)
																		Refund	$57.04
BURRELL, RANDALL SCOTT	BURRELL, RANDALL SCOTT		403 BASINGDON CT		WAXHAW, NC 28173	Proration	0087010882	PHB1536	AUTHORIZED	741978426	Refund Generated due to proration on Bill #0087010882-2024-2024-0000-00	Vehicle Sold	5/13/2026	5/14/2026	001	TAX	($10.36)	$0.00	($10.36)
															026	TAX	($2.53)	$0.00	($2.53)
															003	TAX	($1.11)	$0.00	($1.11)
															005	TAX	($0.25)	$0.00	($0.25)
															004	TAX	($1.85)	$0.00	($1.85)
															002	TAX	($23.77)	$0.00	($23.77)
																		Refund	$39.87

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
CAMPBELL, REBECCA MASTERS	CAMPBELL, REBECCA MASTERS		9658 POTTERS RD		MATTHEWS, NC 28104	Proration	0064489920	JMF2237	AUTHORIZED	865641441	Refund Generated due to proration on Bill #0064489920-2024-2024-0000-00	Vehicle Sold	5/13/2026	5/14/2026	001	TAX	($2.25)	$0.00	($2.25)
															970	TAX	($0.23)	$0.00	($0.23)
															026	TAX	($0.55)	$0.00	($0.55)
															003	TAX	($0.24)	$0.00	($0.24)
															005	TAX	($0.05)	$0.00	($0.05)
															004	TAX	($0.40)	$0.00	($0.40)
															002	TAX	($5.16)	$0.00	($5.16)
																		Refund	$8.88
CHAPRAK, OLEKSIY MICHAEL	CHAPRAK, OLEKSIY MICHAEL		311 THOMPSON CT		INDIAN TRAIL, NC 28079	Proration	0061337678	RAS4705	AUTHORIZED	867271762	Refund Generated due to proration on Bill #0061337678-2024-2024-0000-00	Vehicle Sold	5/21/2026	5/26/2026	001	TAX	($2.53)	$0.00	($2.53)
															600	TAX	($2.87)	$0.00	($2.87)
															020	TAX	($0.83)	$0.00	($0.83)
															003	TAX	($0.27)	$0.00	($0.27)
															005	TAX	($0.06)	$0.00	($0.06)
															004	TAX	($0.45)	$0.00	($0.45)
															002	TAX	($5.80)	$0.00	($5.80)
																		Refund	$12.81
CHEN, STEPHANIE AUVALENE	CHEN, STEPHANIE AUVALENE	CHEN, HSIEN HUI	208 EDEN HOLLOW LN		WEDDINGTON, NC 28104	Proration	0048529549	CAS1193	AUTHORIZED	865394565	Refund Generated due to proration on Bill #0048529549-2024-2024-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($5.61)	$0.00	($5.61)
															800	TAX	($0.86)	$0.00	($0.86)
															026	TAX	($1.37)	$0.00	($1.37)
															003	TAX	($0.60)	$0.00	($0.60)
															005	TAX	($0.13)	$0.00	($0.13)
															004	TAX	($1.00)	$0.00	($1.00)
															002	TAX	($12.85)	$0.00	($12.85)
																		Refund	$22.42
CHIOREAN, CLAUDIU	CHIOREAN, CLAUDIU	CHIOREAN, DIANA ALEXANDRA	4318 HAMPSTEAD HEATH DR		WAXHAW, NC 28173	Proration	0087075330	LFM1665	AUTHORIZED	990564080	Refund Generated due to proration on Bill #0087075330-2025-2025-0000-00	Vehicle Sold	5/19/2026	5/21/2026	001	TAX	($27.17)	$0.00	($27.17)
															500	TAX	($70.11)	$0.00	($70.11)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($11.12)	$0.00	($11.12)
															003	TAX	($2.57)	$0.00	($2.57)
															005	TAX	($1.09)	$0.00	($1.09)
															004	TAX	($9.40)	$0.00	($9.40)
															002	TAX	($64.74)	$0.00	($64.74)
																		Refund	$186.20
CLARK, GARY LEE	CLARK, GARY LEE		1104 MILLVIEW LN		MATTHEWS, NC 28104	Proration	0076698143	I0NIQ5	AUTHORIZED	864083444	Refund Generated due to proration on Bill #0076698143-2024-2024-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($12.19)	$0.00	($12.19)
															700	TAX	($16.13)	$0.00	($16.13)
															023	TAX	($3.82)	$0.00	($3.82)
															003	TAX	($1.31)	$0.00	($1.31)
															005	TAX	($0.29)	$0.00	($0.29)
															004	TAX	($2.18)	$0.00	($2.18)
															002	TAX	($27.95)	$0.00	($27.95)
																		Refund	$63.87
CLAUHS, FREDERICK WALTER	CLAUHS, FREDERICK WALTER		7603 YELLOWHORN TRL		WAXHAW, NC 28173	Proration	0058208028	ISA408	AUTHORIZED	741746862	Refund Generated due to proration on Bill #0058208028-2025-2025-0000-00	Vehicle Sold	5/11/2026	5/12/2026	001	TAX	($24.11)	$0.00	($24.11)
															026	TAX	($6.52)	$0.00	($6.52)
															003	TAX	($2.27)	$0.00	($2.27)
															005	TAX	($0.97)	$0.00	($0.97)
															004	TAX	($8.34)	$0.00	($8.34)
															002	TAX	($57.44)	$0.00	($57.44)
																		Refund	$99.65
COLE, CHRISTOPHER LEE	COLE, CHRISTOPHER LEE		514 ARCADIA LN		MONROE, NC 28112	Proration	0071150874	KFD7532	AUTHORIZED	741107742	Refund Generated due to proration on Bill #0071150874-2025-2025-0000-00	Vehicle Totalled	5/7/2026	5/8/2026	001	TAX	($41.44)	$0.00	($41.44)
															014	TAX	($16.22)	$0.00	($16.22)
															003	TAX	($3.90)	$0.00	($3.90)
															005	TAX	($1.66)	$0.00	($1.66)
															004	TAX	($14.35)	$0.00	($14.35)
															002	TAX	($98.74)	$0.00	($98.74)
																		Refund	$176.31
COLUMBIA, FRANK JOSEPH III	COLUMBIA, FRANK JOSEPH III		2807 BEVIS LN		WAXHAW, NC 28173	Proration	0082307765	LFD1733	AUTHORIZED	990512768	Refund Generated due to proration on Bill #0082307765-2025-2025-0000-00	Vehicle Sold	5/18/2026	5/19/2026	001	TAX	($30.50)	$0.00	($30.50)
															500	TAX	($78.69)	$0.00	($78.69)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($12.48)	$0.00	($12.48)
															003	TAX	($2.88)	$0.00	($2.88)
															005	TAX	($1.22)	$0.00	($1.22)
															004	TAX	($10.55)	$0.00	($10.55)
															002	TAX	($72.67)	$0.00	($72.67)
																		Refund	$208.99
COPELAND, CHARLES DANIEL	COPELAND, CHARLES DANIEL	STANCIL, TANYA BOLLENBECKER	3715 HAIGLER RD		MONROE, NC 28110	Proration	0087600166	VHE6985	AUTHORIZED	743376768	Refund Generated due to proration on Bill #0087600166-2025-2025-0000-00	Vehicle Sold	5/21/2026	5/26/2026	001	TAX	($0.59)	$0.00	($0.59)
															017	TAX	($0.37)	$0.00	($0.37)
															003	TAX	($0.06)	$0.00	($0.06)
															005	TAX	($0.02)	$0.00	($0.02)
															004	TAX	($0.21)	$0.00	($0.21)
															002	TAX	($1.41)	$0.00	($1.41)
																		Refund	$2.66
DAWSON, MARGARET K	DAWSON, MARGARET K		2000 SNIPE LN		SHALLOTTE, NC 28470	Proration	0079050196	RDD9571	AUTHORIZED	744545130	Refund Generated due to proration on Bill #0079050196-2025-2025-0000-00	Vehicle Sold	5/28/2026	5/29/2026	001	TAX	($4.57)	$0.00	($4.57)
															015	TAX	($1.92)	$0.00	($1.92)
															003	TAX	($0.43)	$0.00	($0.43)
															005	TAX	($0.18)	$0.00	($0.18)
															004	TAX	($1.58)	$0.00	($1.58)
															002	TAX	($10.88)	$0.00	($10.88)
																		Refund	$19.56

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
DEAN, DONALD ARTHUR JR	DEAN, DONALD ARTHUR JR		437 N CHRUCH STREET	APT 204	WAXHAW, NC 28173	Adjustment < $100	0090440307	WBD7207	PENDING	1236980050	Refund Generated due to adjustment on Bill #0090440307-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($73.30)	$0.00	($73.30)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															500	TAX	$48.31	$0.00	$48.31
															500	VEHICLE FEE	$25.00	$0.00	$25.00
															028	TAX	$7.66	$0.00	$7.66
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$22.33
DEFRANCO, CHRISTOPHER ANTHONY	DEFRANCO, CHRISTOPHER ANTHONY		510 BAUCOM DEESE RD		MONROE, NC 28110	Adjustment < $100	0091059935	CS64909	PENDING	741745206	Refund Generated due to adjustment on Bill #0091059935-2025-2025-0000-00	Over Assessment	5/11/2026		001	TAX	($12.76)	$0.00	($12.76)
															021	TAX	($6.13)	$0.00	($6.13)
															003	TAX	($1.20)	$0.00	($1.20)
															005	TAX	($0.51)	$0.00	($0.51)
															004	TAX	($4.41)	$0.00	($4.41)
															002	TAX	($30.40)	$0.00	($30.40)
																		Refund	$55.41
DUNDORF, JOHN CONRAD JR	DUNDORF, JOHN CONRAD JR		405 STEPHEN FOSTER WAY		INDIAN TRAIL, NC 28079	Proration	0089046890	NSD2609	AUTHORIZED	864083766	Refund Generated due to proration on Bill #0089046890-2025-2025-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($10.94)	$0.00	($10.94)
															600	TAX	($16.55)	$0.00	($16.55)
															023	TAX	($4.16)	$0.00	($4.16)
															003	TAX	($1.03)	$0.00	($1.03)
															005	TAX	($0.44)	$0.00	($0.44)
															004	TAX	($3.78)	$0.00	($3.78)
															002	TAX	($26.07)	$0.00	($26.07)
																		Refund	$62.97
EAST, LILLIAN HONG MONTALVO	EAST, LILLIAN HONG MONTALVO		1011 HINSON FOREST RD		MONROE, NC 28110	Proration	0074977637	8P4420	AUTHORIZED	740645028	Refund Generated due to proration on Bill #0074977637-2025-2025-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($5.57)	$0.00	($5.57)
															019	TAX	($2.46)	$0.00	($2.46)
															003	TAX	($0.52)	$0.00	($0.52)
															005	TAX	($0.22)	$0.00	($0.22)
															004	TAX	($1.92)	$0.00	($1.92)
															002	TAX	($13.26)	$0.00	($13.26)
																		Refund	$23.95
EFIRD, JENNIFER MICHELLE	EFIRD, JENNIFER MICHELLE		3313 SINCERITY RD		MONROE, NC 28110	Proration	0070510383	KEW1292	AUTHORIZED	742186926	Refund Generated due to proration on Bill #0070510383-2025-2025-0000-00	Vehicle Sold	5/14/2026	5/15/2026	001	TAX	($49.09)	$0.00	($49.09)
															021	TAX	($23.58)	$0.00	($23.58)
															003	TAX	($4.63)	$0.00	($4.63)
															005	TAX	($1.96)	$0.00	($1.96)
															004	TAX	($16.99)	$0.00	($16.99)
															002	TAX	($116.95)	$0.00	($116.95)
																		Refund	$213.20
ELKAZAZ, USAMA AHMED	ELKAZAZ, USAMA AHMED		211 WILSON ST		MONROE, NC 28112	Adjustment < $100	0073129888	KJD7723	PENDING	867009353	Refund Generated due to adjustment on Bill #0073129888-2025-2025-0000-00	Over Assessment	5/20/2026		001	TAX	($3.52)	$0.00	($3.52)
															200	TAX	($13.75)	$0.00	($13.75)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.33)	$0.00	($0.33)
															005	TAX	($0.14)	$0.00	($0.14)
															004	TAX	($1.21)	$0.00	($1.21)
															002	TAX	($8.37)	$0.00	($8.37)
																		Refund	$27.32
EMBREY, MARK ALLEN	EMBREY, MARK ALLEN		3800 EDGEVIEW DR		INDIAN TRAIL, NC 28079	Proration	0072505478	TDV5231	AUTHORIZED	868227241	Refund Generated due to proration on Bill #0072505478-2024-2024-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($2.79)	$0.00	($2.79)
															600	TAX	($3.17)	$0.00	($3.17)
															023	TAX	($0.88)	$0.00	($0.88)
															003	TAX	($0.30)	$0.00	($0.30)
															005	TAX	($0.07)	$0.00	($0.07)
															004	TAX	($0.50)	$0.00	($0.50)
															002	TAX	($6.41)	$0.00	($6.41)
																		Refund	$14.12
EPSTEIN, AMY L	EPSTEIN, AMY L	EPSTEIN, MARK A	6027 WALDORF AVE		MONROE, NC 28110	Proration	0075456602	KMS4021	AUTHORIZED	744195810	Refund Generated due to proration on Bill #0075456602-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($34.93)	$0.00	($34.93)
															015	TAX	($14.73)	$0.00	($14.73)
															003	TAX	($3.29)	$0.00	($3.29)
															005	TAX	($1.40)	$0.00	($1.40)
															004	TAX	($12.09)	$0.00	($12.09)
															002	TAX	($83.24)	$0.00	($83.24)
																		Refund	$149.68
FECKER, JEREMY GENE	FECKER, JEREMY GENE		2005 PLANTERS KNOLL DR		MONROE, NC 28110	Proration	0017913596	TVV3207	AUTHORIZED	865395209	Refund Generated due to proration on Bill #0017913596-2024-2024-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($0.40)	$0.00	($0.40)
															600	TAX	($0.46)	$0.00	($0.46)
															019	TAX	($0.16)	$0.00	($0.16)
															003	TAX	($0.04)	$0.00	($0.04)
															005	TAX	($0.01)	$0.00	($0.01)
															004	TAX	($0.07)	$0.00	($0.07)
															002	TAX	($0.93)	$0.00	($0.93)
																		Refund	$2.07

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
FITZGERALD, ROBERT MAURICE	FITZGERALD, ROBERT MAURICE	FITZGERALD, THERESA D	1021 WATERVIEW LN		MONROE, NC 28110	Proration	0058645962	TEF5426	AUTHORIZED	864085845	Refund Generated due to proration on Bill #0058645962-2025-2025-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($5.68)	$0.00	($5.68)
															200	TAX	($22.23)	$0.00	($22.23)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.53)	$0.00	($0.53)
															005	TAX	($0.23)	$0.00	($0.23)
															004	TAX	($1.97)	$0.00	($1.97)
															002	TAX	($13.53)	$0.00	($13.53)
																		Refund	$44.17
FLORES LOPEZ, JULIO CESAR	FLORES LOPEZ, JULIO CESAR	OLAIZOLA HERRERA, ALBANY JOHALEINES	2300 PEBBLE CLOSE CT		MONROE, NC 28110	Proration	0068635730	RAD2067	AUTHORIZED	863150876	Refund Generated due to proration on Bill #0068635730-2025-2025-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($20.95)	$0.00	($20.95)
															200	TAX	($82.03)	$0.00	($82.03)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.98)	$0.00	($1.98)
															005	TAX	($0.84)	$0.00	($0.84)
															004	TAX	($7.25)	$0.00	($7.25)
															002	TAX	($49.93)	$0.00	($49.93)
																		Refund	$162.98
FRANCIS, BRITTNEY NICOLE	FRANCIS, BRITTNEY NICOLE		2004 BIKAR CT		INDIAN TRAIL, NC 28079	Proration	0076742302	EMC3152	AUTHORIZED	864385382	Refund Generated due to proration on Bill #0076742302-2024-2024-0000-00	Vehicle Totalled	5/6/2026	5/7/2026	001	TAX	($1.73)	$0.00	($1.73)
															600	TAX	($1.96)	$0.00	($1.96)
															023	TAX	($0.54)	$0.00	($0.54)
															003	TAX	($0.18)	$0.00	($0.18)
															005	TAX	($0.04)	$0.00	($0.04)
															004	TAX	($0.31)	$0.00	($0.31)
															002	TAX	($3.97)	$0.00	($3.97)
																		Refund	$8.73
FREITAS, FRANCISCO ANTONIO	FREITAS, FRANCISCO ANTONIO		2003 KATIE ALICE CIR		WAXHAW, NC 28173	Proration	0088747644	SAFKJ	AUTHORIZED	741295110	Refund Generated due to proration on Bill #0088747644-2025-2025-0000-00	Vehicle Sold	5/8/2026	5/11/2026	001	TAX	($30.06)	$0.00	($30.06)
															015	TAX	($12.68)	$0.00	($12.68)
															003	TAX	($2.83)	$0.00	($2.83)
															005	TAX	($1.20)	$0.00	($1.20)
															004	TAX	($10.40)	$0.00	($10.40)
															002	TAX	($71.61)	$0.00	($71.61)
																		Refund	$128.78
FULTZ-BAZIN, NINA ANJANETTE	FULTZ-BAZIN, NINA ANJANETTE		4041 WHIPCORD DR		WAXHAW, NC 28173	Proration	0088158291	K4W4II	AUTHORIZED	993140152	Refund Generated due to proration on Bill #0088158291-2025-2025-0000-00	Vehicle Sold	5/29/2026	6/1/2026	001	TAX	($3.57)	$0.00	($3.57)
															500	TAX	($9.22)	$0.00	($9.22)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($1.46)	$0.00	($1.46)
															003	TAX	($0.33)	$0.00	($0.33)
															005	TAX	($0.14)	$0.00	($0.14)
															004	TAX	($1.23)	$0.00	($1.23)
															002	TAX	($8.51)	$0.00	($8.51)
																		Refund	$24.46
GALLOWAY, JASON WAYNE	GALLOWAY, JASON WAYNE		6702 RENSHAW CT		WAXHAW, NC 28173	Proration	0087580841	LKW2799	AUTHORIZED	742922382	Refund Generated due to proration on Bill #0087580841-2025-2025-0000-00	Vehicle Sold	5/19/2026	5/21/2026	001	TAX	($15.00)	$0.00	($15.00)
															026	TAX	($4.06)	$0.00	($4.06)
															003	TAX	($1.41)	$0.00	($1.41)
															005	TAX	($0.60)	$0.00	($0.60)
															004	TAX	($5.19)	$0.00	($5.19)
															002	TAX	($35.73)	$0.00	($35.73)
																		Refund	$61.99
GARCES, ROSA MARIA	GARCES, ROSA MARIA		1005 MENDENHALL ST		INDIAN TRAIL, NC 28079	Proration	0080531426	LEF1199	AUTHORIZED	865396175	Refund Generated due to proration on Bill #0080531426-2025-2025-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($9.99)	$0.00	($9.99)
															600	TAX	($15.11)	$0.00	($15.11)
															023	TAX	($3.80)	$0.00	($3.80)
															003	TAX	($0.94)	$0.00	($0.94)
															005	TAX	($0.40)	$0.00	($0.40)
															004	TAX	($3.46)	$0.00	($3.46)
															002	TAX	($23.80)	$0.00	($23.80)
																		Refund	$57.50
GHERIAFI, SAMER JOSEPH	GHERIAFI, SAMER JOSEPH		4000 LILY POND CIR		WAXHAW, NC 28173	Proration	0087179641	LKW1838	AUTHORIZED	992333024	Refund Generated due to proration on Bill #0087179641-2025-2025-0000-00	Vehicle Sold	5/27/2026	5/28/2026	001	TAX	($11.58)	$0.00	($11.58)
															500	TAX	($29.88)	$0.00	($29.88)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($4.74)	$0.00	($4.74)
															003	TAX	($1.09)	$0.00	($1.09)
															005	TAX	($0.47)	$0.00	($0.47)
															004	TAX	($4.01)	$0.00	($4.01)
															002	TAX	($27.59)	$0.00	($27.59)
																		Refund	$79.36
GLASCOCK, PAMELA THOMAS	GLASCOCK, PAMELA THOMAS		548 DOVEFIELD DR		INDIAN TRAIL, NC 28079	Proration	0007022725	ZYN4136	AUTHORIZED	865395566	Refund Generated due to proration on Bill #0007022725-2025-2025-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($2.95)	$0.00	($2.95)
															970	TAX	($0.59)	$0.00	($0.59)
															020	TAX	($1.21)	$0.00	($1.21)
															003	TAX	($0.28)	$0.00	($0.28)
															005	TAX	($0.12)	$0.00	($0.12)
															004	TAX	($1.02)	$0.00	($1.02)
															002	TAX	($7.03)	$0.00	($7.03)
																		Refund	$13.20

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
GOJE, ANIL KUMAR	GOJE, ANIL KUMAR		1205 LAFAYETTE PARK LN		MATTHEWS, NC 28104	Proration	0075763995	EBJ8748	AUTHORIZED	865369435	Refund Generated due to proration on Bill #0075763995-2025-2025-0000-00	Vehicle Sold	5/11/2026	5/12/2026	001	TAX	($7.58)	$0.00	($7.58)
															800	TAX	($2.36)	$0.00	($2.36)
															026	TAX	($2.05)	$0.00	($2.05)
															003	TAX	($0.71)	$0.00	($0.71)
															005	TAX	($0.30)	$0.00	($0.30)
															004	TAX	($2.62)	$0.00	($2.62)
															002	TAX	($18.07)	$0.00	($18.07)
																		Refund	$33.69
GOMEZ, JOSE RAMON	GOMEZ, JOSE RAMON		9751 WARDLEY DR		CHARLOTTE, NC 28215	Proration	0084538002	VFL6300	AUTHORIZED	865641574	Refund Generated due to proration on Bill #0084538002-2024-2024-0000-00	Vehicle Sold	5/13/2026	5/14/2026	001	TAX	($5.17)	$0.00	($5.17)
															600	TAX	($5.87)	$0.00	($5.87)
															023	TAX	($1.63)	$0.00	($1.63)
															003	TAX	($0.55)	$0.00	($0.55)
															005	TAX	($0.12)	$0.00	($0.12)
															004	TAX	($0.93)	$0.00	($0.93)
															002	TAX	($11.87)	$0.00	($11.87)
																		Refund	$26.14
HARRISON, MAMIE ELIZABETH	HARRISON, MAMIE ELIZABETH		1108 AFTERNOON SUN RD		STALLINGS, NC 28104	Proration	0066838050	JJA8048	AUTHORIZED	864083507	Refund Generated due to proration on Bill #0066838050-2024-2024-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($3.08)	$0.00	($3.08)
															700	TAX	($4.08)	$0.00	($4.08)
															023	TAX	($0.97)	$0.00	($0.97)
															003	TAX	($0.33)	$0.00	($0.33)
															005	TAX	($0.07)	$0.00	($0.07)
															004	TAX	($0.55)	$0.00	($0.55)
															002	TAX	($7.07)	$0.00	($7.07)
																		Refund	$16.15
HASSINGER, LUKE EVAN	HASSINGER, LUKE EVAN		2203 POTTER DOWNS DR		WAXHAW, NC 28173	Proration	0078111950	TKR8382	AUTHORIZED	868636531	Refund Generated due to proration on Bill #0078111950-2025-2025-0000-00	Vehicle Sold	5/28/2026	5/29/2026	001	TAX	($46.84)	$0.00	($46.84)
															990	TAX	($7.30)	$0.00	($7.30)
															015	TAX	($19.75)	$0.00	($19.75)
															003	TAX	($4.42)	$0.00	($4.42)
															005	TAX	($1.88)	$0.00	($1.88)
															004	TAX	($16.21)	$0.00	($16.21)
															002	TAX	($111.59)	$0.00	($111.59)
																		Refund	$207.99
HATHCOCK, ALEC BAILEY	HATHCOCK, ALEC BAILEY		810 GLENN DR		MONROE, NC 28110	Proration	0090329564	LFR9016	AUTHORIZED	740644836	Refund Generated due to proration on Bill #0090329564-2025-2025-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($32.41)	$0.00	($32.41)
															015	TAX	($13.67)	$0.00	($13.67)
															003	TAX	($3.05)	$0.00	($3.05)
															005	TAX	($1.30)	$0.00	($1.30)
															004	TAX	($11.22)	$0.00	($11.22)
															002	TAX	($77.23)	$0.00	($77.23)
																		Refund	$138.88
HAYNES, GLADYS	HAYNES, GLADYS		210 LINDPOINT LN		MONROE, NC 28110	Proration	0090508983	MCE8147	AUTHORIZED	742186896	Refund Generated due to proration on Bill #0090508983-2025-2025-0000-00	Vehicle Sold	5/14/2026	5/15/2026	001	TAX	($21.68)	$0.00	($21.68)
															019	TAX	($9.57)	$0.00	($9.57)
															003	TAX	($2.04)	$0.00	($2.04)
															005	TAX	($0.87)	$0.00	($0.87)
															004	TAX	($7.50)	$0.00	($7.50)
															002	TAX	($51.66)	$0.00	($51.66)
																		Refund	$93.32
HAYNES, WILLIE	HAYNES, WILLIE		210 LINDPOINT LN		MONROE, NC 28110	Proration	0073269801	FKP2192	AUTHORIZED	742186914	Refund Generated due to proration on Bill #0073269801-2025-2025-0000-00	Vehicle Sold	5/14/2026	5/15/2026	001	TAX	($10.84)	$0.00	($10.84)
															019	TAX	($4.78)	$0.00	($4.78)
															003	TAX	($1.02)	$0.00	($1.02)
															005	TAX	($0.43)	$0.00	($0.43)
															004	TAX	($3.75)	$0.00	($3.75)
															002	TAX	($25.83)	$0.00	($25.83)
																		Refund	$46.65
HERRERA APAN, RICARDO ALEXIS	HERRERA APAN, RICARDO ALEXIS		3400 SAVANNAH WAY		MONROE, NC 28110	Proration	0074815852	KKS1923	AUTHORIZED	868291207	Refund Generated due to proration on Bill #0074815852-2025-2025-0000-00	Vehicle Totalled	5/27/2026	5/28/2026	001	TAX	($10.01)	$0.00	($10.01)
															200	TAX	($39.20)	$0.00	($39.20)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.95)	$0.00	($0.95)
															005	TAX	($0.40)	$0.00	($0.40)
															004	TAX	($3.47)	$0.00	($3.47)
															002	TAX	($23.86)	$0.00	($23.86)
																		Refund	$77.89
HILES, MARC STEPHEN	HILES, MARC STEPHEN		4105 CHRISTINE LN UNIT D		WAXHAW, NC 28173	Proration	0073901205	6Z51BP	AUTHORIZED	987869736	Refund Generated due to proration on Bill #0073901205-2025-2025-0000-00	Vehicle Sold	5/6/2026	5/7/2026	001	TAX	($11.35)	$0.00	($11.35)
															500	TAX	($29.27)	$0.00	($29.27)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($4.64)	$0.00	($4.64)
															003	TAX	($1.07)	$0.00	($1.07)
															005	TAX	($0.45)	$0.00	($0.45)
															004	TAX	($3.93)	$0.00	($3.93)
															002	TAX	($27.03)	$0.00	($27.03)
																		Refund	$77.74

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
HINDMAN, KATHY PLUMMER	HINDMAN, KATHY PLUMMER		3609 WILD ROSE CT		MATTHEWS, NC 28104	Proration	0080722285	FLT9819	AUTHORIZED	989840336	Refund Generated due to proration on Bill #0080722285-2025-2025-0000-00	Vehicle Sold	5/15/2026	5/18/2026	001	TAX	($13.57)	$0.00	($13.57)
															700	TAX	($22.81)	$0.00	($22.81)
															700	VEHICLE FEE	$0.00	$0.00	$0.00
															023	TAX	($5.15)	$0.00	($5.15)
															003	TAX	($1.28)	$0.00	($1.28)
															005	TAX	($0.54)	$0.00	($0.54)
															004	TAX	($4.69)	$0.00	($4.69)
															002	TAX	($32.32)	$0.00	($32.32)
																		Refund	$80.36
HOOK, DIANE LOUISE	HOOK, DIANE LOUISE	HOOK, LARRY DOUGLAS	470 SALMON WAY		CORVALLIS, MT 59828	Proration	0040817585	2DAYSB	AUTHORIZED	988392824	Refund Generated due to proration on Bill #0040817585-2025-2025-0000-00	Reg . Out of state	5/8/2026	5/11/2026	001	TAX	($21.12)	$0.00	($21.12)
															500	TAX	($54.49)	$0.00	($54.49)
															500	VEHICLE FEE	($25.00)	$0.00	($25.00)
															028	TAX	($8.64)	$0.00	($8.64)
															003	TAX	($1.99)	$0.00	($1.99)
															005	TAX	($0.85)	$0.00	($0.85)
															004	TAX	($7.31)	$0.00	($7.31)
															002	TAX	($50.32)	$0.00	($50.32)
																		Refund	$169.72
HOOPAUGH GRADING COMPANYLLC	HOOPAUGH GRADING COMPANYLLC		4006 VAN DKYE CT		MONROE, NC 28110	Proration	0074374416	KY8116	AUTHORIZED	742379922	Refund Generated due to proration on Bill #0074374416-2025-2025-0000-00	Vehicle Sold	5/15/2026	5/18/2026	001	TAX	($10.62)	$0.00	($10.62)
															023	TAX	($4.03)	$0.00	($4.03)
															003	TAX	($1.00)	$0.00	($1.00)
															005	TAX	($0.42)	$0.00	($0.42)
															004	TAX	($3.68)	$0.00	($3.68)
															002	TAX	($25.32)	$0.00	($25.32)
																		Refund	$45.07
HUNNICUTT, ANITA ANN	HUNNICUTT, ANITA ANN		5701 BENTGRASS CT		MONROE, NC 28110	Proration	0059403235	VBD6392	AUTHORIZED	867010095	Refund Generated due to proration on Bill #0059403235-2024-2024-0000-00	Vehicle Sold	5/20/2026	5/21/2026	001	TAX	($1.54)	$0.00	($1.54)
															980	TAX	($0.19)	$0.00	($0.19)
															021	TAX	($0.64)	$0.00	($0.64)
															003	TAX	($0.16)	$0.00	($0.16)
															005	TAX	($0.04)	$0.00	($0.04)
															004	TAX	($0.27)	$0.00	($0.27)
															002	TAX	($3.53)	$0.00	($3.53)
																		Refund	$6.37
HUNT, WILLIAM SCOTT	HUNT, WILLIAM SCOTT		5103 TRINITY TRACE LN		MONROE, NC 28110	Proration	0088645337	LMT6958	AUTHORIZED	742922262	Refund Generated due to proration on Bill #0088645337-2025-2025-0000-00	Vehicle Sold	5/19/2026	5/21/2026	001	TAX	($26.50)	$0.00	($26.50)
															026	TAX	($7.17)	$0.00	($7.17)
															003	TAX	($2.50)	$0.00	($2.50)
															005	TAX	($1.06)	$0.00	($1.06)
															004	TAX	($9.17)	$0.00	($9.17)
															002	TAX	($63.14)	$0.00	($63.14)
																		Refund	$109.54
IANNETTO, JAKE ANDREW	IANNETTO, JAKE ANDREW		5725 LINDLEY CRESCENT DR		INDIAN TRAIL, NC 28079	Proration	0086379424	VS3293	AUTHORIZED	739843734	Refund Generated due to proration on Bill #0086379424-2025-2025-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($14.02)	($0.71)	($14.73)
															026	TAX	($3.79)	($0.19)	($3.98)
															003	TAX	($1.32)	($0.06)	($1.38)
															005	TAX	($0.56)	($0.03)	($0.59)
															004	TAX	($4.85)	($0.24)	($5.09)
															002	TAX	($33.40)	($1.67)	($35.07)
																		Refund	$60.84
IVERSON, CRAIG ALAN	IVERSON, CRAIG ALAN		316 COLD SPRING RD		MILTON, VT 05468	Proration	0080794707	CAICT	AUTHORIZED	740901720	Refund Generated due to proration on Bill #0080794707-2025-2025-0000-00	Vehicle Sold	5/6/2026	5/7/2026	001	TAX	($12.40)	$0.00	($12.40)
															028	TAX	($5.07)	$0.00	($5.07)
															003	TAX	($1.17)	$0.00	($1.17)
															005	TAX	($0.50)	$0.00	($0.50)
															004	TAX	($4.29)	$0.00	($4.29)
															002	TAX	($29.55)	$0.00	($29.55)
																		Refund	$52.98
JG FLEET LLC	JG FLEET LLC		4000 LILY POND CIR		WAXHAW, NC 28173	Proration	0087339397	LKC2717	AUTHORIZED	992333032	Refund Generated due to proration on Bill #0087339397-2025-2025-0000-00	Vehicle Sold	5/27/2026	5/28/2026	001	TAX	($1.88)	$0.00	($1.88)
															500	TAX	($4.85)	$0.00	($4.85)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($0.77)	$0.00	($0.77)
															003	TAX	($0.18)	$0.00	($0.18)
															005	TAX	($0.08)	$0.00	($0.08)
															004	TAX	($0.65)	$0.00	($0.65)
															002	TAX	($4.48)	$0.00	($4.48)
																		Refund	$12.89
JG FLEET LLC	JG FLEET LLC		4000 LILY POND CIR		WAXHAW, NC 28173	Proration	0087959590	VHY6057	AUTHORIZED	992333072	Refund Generated due to proration on Bill #0087959590-2025-2025-0000-00	Vehicle Sold	5/27/2026	5/28/2026	001	TAX	($4.16)	$0.00	($4.16)
															500	TAX	($10.74)	$0.00	($10.74)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($1.70)	$0.00	($1.70)
															003	TAX	($0.39)	$0.00	($0.39)
															005	TAX	($0.17)	$0.00	($0.17)
															004	TAX	($1.44)	$0.00	($1.44)
															002	TAX	($9.92)	$0.00	($9.92)
																		Refund	$28.52

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
JONES, JOHN HENTON	JONES, JOHN HENTON	JONES, GRACE ANN	1016 FAIRBRAE LN		INDIAN TRAIL, NC 28079	Proration	0073138395	JAX7883	AUTHORIZED	865886238	Refund Generated due to proration on Bill #0073138395-2025-2025-0000-00	Vehicle Sold	5/14/2026	5/15/2026	001	TAX	($20.78)	$0.00	($20.78)
															600	TAX	($31.43)	$0.00	($31.43)
															023	TAX	($7.89)	$0.00	($7.89)
															003	TAX	($1.96)	$0.00	($1.96)
															005	TAX	($0.83)	$0.00	($0.83)
															004	TAX	($7.20)	$0.00	($7.20)
															002	TAX	($49.52)	$0.00	($49.52)
																		Refund	$119.61
KANIA, STEVEN MICHAEL	KANIA, STEVEN MICHAEL		1012 WELLSCROFT RD		INDIAN TRAIL, NC 28079	Proration	0080325519	RHN9046	AUTHORIZED	863151044	Refund Generated due to proration on Bill #0080325519-2025-2025-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($17.98)	$0.00	($17.98)
															600	TAX	($27.19)	$0.00	($27.19)
															023	TAX	($6.83)	$0.00	($6.83)
															003	TAX	($1.69)	$0.00	($1.69)
															005	TAX	($0.72)	$0.00	($0.72)
															004	TAX	($6.22)	$0.00	($6.22)
															002	TAX	($42.84)	$0.00	($42.84)
																		Refund	$103.47
KELLY, SARAH ANNE	KELLY, SARAH ANNE		427 RICH ST		ROCK HILL, SC 29730	Proration	0041787168	EKT4349	AUTHORIZED	989839696	Refund Generated due to proration on Bill #0041787168-2024-2024-0000-00	Vehicle Sold	5/15/2026	5/18/2026	001	TAX	($2.95)	$0.00	($2.95)
															500	TAX	($6.96)	$0.00	($6.96)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($0.94)	$0.00	($0.94)
															003	TAX	($0.32)	$0.00	($0.32)
															005	TAX	($0.07)	$0.00	($0.07)
															004	TAX	($0.53)	$0.00	($0.53)
															002	TAX	($6.77)	$0.00	($6.77)
																		Refund	$18.54
KETRON, DIANE ELAINE	KETRON, DIANE ELAINE	KETRON, ANTHONY STEPHEN	1214 DOBSON DR		WAXHAW, NC 28173	Proration	0046660687	PLP9441	AUTHORIZED	865395720	Refund Generated due to proration on Bill #0046660687-2025-2025-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($12.70)	$0.00	($12.70)
															970	TAX	($2.54)	$0.00	($2.54)
															026	TAX	($3.43)	$0.00	($3.43)
															003	TAX	($1.20)	$0.00	($1.20)
															005	TAX	($0.51)	$0.00	($0.51)
															004	TAX	($4.39)	$0.00	($4.39)
															002	TAX	($30.25)	$0.00	($30.25)
																		Refund	$55.02
KIRILLOVA, NATALIA SERGEYEVNA	KIRILLOVA, NATALIA SERGEYEVNA		2928 FAIRCROFT WAY		MONROE, NC 28110	Adjustment < $100	0091156314	RLN9971	PENDING	867008373	Refund Generated due to adjustment on Bill #0091156314-2025-2025-0000-00	SLVG or RBLT TTL	5/20/2026		001	TAX	($17.14)	$0.00	($17.14)
															600	TAX	($25.94)	$0.00	($25.94)
															019	TAX	($7.57)	$0.00	($7.57)
															003	TAX	($1.62)	$0.00	($1.62)
															005	TAX	($0.69)	$0.00	($0.69)
															004	TAX	($5.93)	$0.00	($5.93)
															002	TAX	($40.85)	$0.00	($40.85)
																		Refund	$99.74
KOTARA, DANIELA TARA	KOTARA, DANIELA TARA		102 W WILSON ST	BYRUM 912	WINGATE, NC 28174	Adjustment < $100	0091194729	MDA7027	PENDING	1238959420	Refund Generated due to adjustment on Bill #0091194729-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($49.90)	$0.00	($49.90)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															300	TAX	$28.35	$0.00	$28.35
															300	VEHICLE FEE	$25.00	$0.00	$25.00
															022	TAX	$8.15	$0.00	$8.15
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$18.40
KRAFTSON, JEFFREY SCOTT	KRAFTSON, JEFFREY SCOTT		832 CLONMEL DR		MATTHEWS, NC 28104	Proration	0072982829	KEC4180	AUTHORIZED	865885265	Refund Generated due to proration on Bill #0072982829-2024-2024-0000-00	Vehicle Sold	5/14/2026	5/15/2026	001	TAX	($21.22)	$0.00	($21.22)
															700	TAX	($28.08)	$0.00	($28.08)
															023	TAX	($6.66)	$0.00	($6.66)
															003	TAX	($2.28)	$0.00	($2.28)
															005	TAX	($0.51)	$0.00	($0.51)
															004	TAX	($3.80)	$0.00	($3.80)
															002	TAX	($48.65)	$0.00	($48.65)
																		Refund	$111.20
KURUWITA, JANITH NIRMAL	KURUWITA, JANITH NIRMAL		2917 MATTHEWS INDIAN TRAI	TRAIL RD	MATTHEWS, NC 28104	Adjustment < $100	0090984231	VBD5679	PENDING	1238959550	Refund Generated due to adjustment on Bill #0090984231-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($97.24)	$0.00	($97.24)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															700	TAX	$41.77	$0.00	$41.77
															700	VEHICLE FEE	$25.00	$0.00	$25.00
															020	TAX	$10.21	$0.00	$10.21
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$50.26

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
LEE, JONATHAN STEPHEN	LEE, JONATHAN STEPHEN		629 LOCHAVEN RD		WAXHAW, NC 28173	Adjustment < $100	0090981576	MCH3808	PENDING	864625167	Refund Generated due to adjustment on Bill #0090981576-2025-2025-0000-00	Over Assessment	5/7/2026		001	TAX	($9.32)	$0.00	($9.32)
															800	TAX	($2.91)	$0.00	($2.91)
															026	TAX	($2.52)	$0.00	($2.52)
															003	TAX	($0.87)	$0.00	($0.87)
															005	TAX	($0.37)	$0.00	($0.37)
															004	TAX	($3.23)	$0.00	($3.23)
															002	TAX	($22.21)	$0.00	($22.21)
																		Refund	$41.43
LETT, ANNA ALEXIS	LETT, ANNA ALEXIS		401 E S MAIN ST APT 228B		WAXHAW, NC 28173	Adjustment < $100	0090966697	MBD5858	PENDING	1236629860	Refund Generated due to adjustment on Bill #0090966697-2025-2025-0000	Situs error	5/13/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($10.74)	$0.00	($10.74)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															500	TAX	$7.08	$0.00	$7.08
															500	VEHICLE FEE	$25.00	$0.00	$25.00
															028	TAX	$1.12	$0.00	$1.12
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$7.54
LIPCSEY, THOMAS JOHN	LIPCSEY, THOMAS JOHN		2000 SNIPE LN		SHALLOTTE, NC 28470	Proration	0086346381	LJM9362	AUTHORIZED	744250146	Refund Generated due to proration on Bill #0086346381-2025-2025-0000-00	Vehicle Sold	5/27/2026	5/28/2026	001	TAX	($7.27)	$0.00	($7.27)
															015	TAX	($3.06)	$0.00	($3.06)
															003	TAX	($0.68)	$0.00	($0.68)
															005	TAX	($0.29)	$0.00	($0.29)
															004	TAX	($2.51)	$0.00	($2.51)
															002	TAX	($17.31)	$0.00	($17.31)
																		Refund	$31.12
LOMBARDO, THOMAS STEVEN	LOMBARDO, THOMAS STEVEN		6041 OXFORDSHIRE RD		WAXHAW, NC 28173	Proration	0072157394	TLV4836	AUTHORIZED	864085656	Refund Generated due to proration on Bill #0072157394-2024-2024-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($4.21)	$0.00	($4.21)
															800	TAX	($0.64)	$0.00	($0.64)
															026	TAX	($1.03)	$0.00	($1.03)
															003	TAX	($0.45)	$0.00	($0.45)
															005	TAX	($0.10)	$0.00	($0.10)
															004	TAX	($0.75)	$0.00	($0.75)
															002	TAX	($9.66)	$0.00	($9.66)
																		Refund	$16.84
LONG, RENEE BROWER	LONG, RENEE BROWER	LONG, ROBERT LEE JR	4000 CHERRY TREE DR		MONROE, NC 28110	Proration	0077151374	KJR8137	AUTHORIZED	741107142	Refund Generated due to proration on Bill #0077151374-2024-2024-0000-00	Vehicle Totalled	5/7/2026	5/8/2026	001	TAX	($3.42)	$0.00	($3.42)
															017	TAX	($1.23)	$0.00	($1.23)
															003	TAX	($0.37)	$0.00	($0.37)
															005	TAX	($0.08)	$0.00	($0.08)
															004	TAX	($0.61)	$0.00	($0.61)
															002	TAX	($7.84)	$0.00	($7.84)
																		Refund	$13.55
LOPEZ, BRIAN ANTONIO	LOPEZ, BRIAN ANTONIO		2701 CREEK MANOR DR		WAXHAW, NC 28173	Proration	0007165325	BEW6513	AUTHORIZED	744854562	Refund Generated due to proration on Bill #0007165325-2025-2025-0000-00	Vehicle Sold	5/29/2026	6/1/2026	001	TAX	($3.70)	$0.00	($3.70)
															026	TAX	($1.00)	$0.00	($1.00)
															003	TAX	($0.35)	$0.00	($0.35)
															005	TAX	($0.15)	$0.00	($0.15)
															004	TAX	($1.28)	$0.00	($1.28)
															002	TAX	($8.82)	$0.00	($8.82)
																		Refund	$15.30
LOPEZ, RICHARD JAMES	LOPEZ, RICHARD JAMES	LOPEZ, JESSICA CATHERINE	1013 ONYX LN		INDIAN TRAIL, NC 28079	Proration	0070128033	KEB3024	AUTHORIZED	868291256	Refund Generated due to proration on Bill #0070128033-2025-2025-0000-00	Vehicle Sold	5/27/2026	5/28/2026	001	TAX	($37.96)	$0.00	($37.96)
															600	TAX	($57.41)	$0.00	($57.41)
															023	TAX	($14.42)	$0.00	($14.42)
															003	TAX	($3.58)	$0.00	($3.58)
															005	TAX	($1.52)	$0.00	($1.52)
															004	TAX	($13.14)	$0.00	($13.14)
															002	TAX	($90.45)	$0.00	($90.45)
																		Refund	$218.48
LOWE, BRITTANY TAYLOR	LOWE, BRITTANY TAYLOR		1130 WALBURY HILL RD		WAXHAW, NC 28173	Proration	0085292655	KKL2108	AUTHORIZED	993139352	Refund Generated due to proration on Bill #0085292655-2024-2024-0000-00	Vehicle Sold	5/29/2026	6/1/2026	001	TAX	($39.16)	($2.25)	($41.41)
															500	TAX	($92.37)	($5.32)	($97.69)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($12.55)	($0.72)	($13.27)
															003	TAX	($4.20)	($0.24)	($4.44)
															005	TAX	($0.94)	($0.05)	($0.99)
															004	TAX	($7.01)	($0.40)	($7.41)
															002	TAX	($89.78)	($5.17)	($94.95)
																		Refund	$260.16
LOWE, GEORGE THOMAS	LOWE, GEORGE THOMAS		9005 OAKMERE RD		WAXHAW, NC 28173	Proration	0065291778	RDR1392	AUTHORIZED	993139384	Refund Generated due to proration on Bill #0065291778-2025-2025-0000-00	Vehicle Sold	5/29/2026	6/1/2026	001	TAX	($42.12)	$0.00	($42.12)
															500	TAX	($108.67)	$0.00	($108.67)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($17.24)	$0.00	($17.24)
															003	TAX	($3.97)	$0.00	($3.97)
															005	TAX	($1.68)	$0.00	($1.68)
															004	TAX	($14.57)	$0.00	($14.57)
															002	TAX	($100.36)	$0.00	($100.36)
																		Refund	$288.61

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
MAHONEY, SHANNON MARIE	MAHONEY, SHANNON MARIE		8911 CREEKSTONE RD		WAXHAW, NC 28173	Proration	0074585764	HLS4484	AUTHORIZED	741977670	Refund Generated due to proration on Bill #0074585764-2025-2025-0000-00	Vehicle Sold	5/13/2026	5/14/2026	001	TAX	($32.34)	$0.00	($32.34)
															026	TAX	($8.74)	$0.00	($8.74)
															003	TAX	($3.05)	$0.00	($3.05)
															005	TAX	($1.30)	$0.00	($1.30)
															004	TAX	($11.19)	$0.00	($11.19)
															002	TAX	($77.05)	$0.00	($77.05)
																		Refund	$133.67
MASARU, DUMITRU	MASARU, DUMITRU		10612 LANCASTER HWY		WAXHAW, NC 28173	Proration	0076218112	KMP3311	AUTHORIZED	741978540	Refund Generated due to proration on Bill #0076218112-2025-2025-0000-00	Vehicle Totalled	5/13/2026	5/14/2026	001	TAX	($33.60)	$0.00	($33.60)
															025	TAX	($13.33)	$0.00	($13.33)
															003	TAX	($3.17)	$0.00	($3.17)
															005	TAX	($1.34)	$0.00	($1.34)
															004	TAX	($11.62)	$0.00	($11.62)
															002	TAX	($80.05)	$0.00	($80.05)
																		Refund	$143.11
MASSEY, RONNIE LEE	MASSEY, RONNIE LEE		240 PORTRAIT WAY		INDIAN TRAIL, NC 28079	Proration	0089352263	VHZ4147	AUTHORIZED	863150729	Refund Generated due to proration on Bill #0089352263-2025-2025-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($32.67)	$0.00	($32.67)
															600	TAX	($49.42)	$0.00	($49.42)
															023	TAX	($12.41)	$0.00	($12.41)
															003	TAX	($3.08)	$0.00	($3.08)
															005	TAX	($1.31)	$0.00	($1.31)
															004	TAX	($11.31)	$0.00	($11.31)
															002	TAX	($77.84)	$0.00	($77.84)
																		Refund	$188.04
MENDES SOARES, LUCIANE FELIX	MENDES SOARES, LUCIANE FELIX		3507 BROOKSTONE TRL		INDIAN TRAIL, NC 28079	Adjustment < $100	0090527794	WBD7099	PENDING	1112966955	Refund Generated due to adjustment on Bill #0090527794-2025-2025-0000	Situs error	5/13/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$5.93	$0.00	$5.93
															200	TAX	($15.36)	$0.00	($15.36)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															023	TAX	$1.49	$0.00	$1.49
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$37.94
MERCER, LAUWREN KIAH	MERCER, LAUWREN KIAH		2777 OLDFIELD DR		MONROE, NC 28110	Proration	0080440688	RJL6931	AUTHORIZED	866700604	Refund Generated due to proration on Bill #0080440688-2025-2025-0000-00	Vehicle Sold	5/18/2026	5/19/2026	001	TAX	($16.13)	($0.82)	($16.95)
															200	TAX	($63.14)	($3.15)	($66.29)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.52)	($0.07)	($1.59)
															005	TAX	($0.64)	($0.03)	($0.67)
															004	TAX	($5.58)	($0.28)	($5.86)
															002	TAX	($38.43)	($1.92)	($40.35)
																		Refund	$131.71
MERINO, NANCY	MERINO, NANCY		2027 PLEASANT KNOLL LN		MONROE, NC 28112	Adjustment < $100	0064358636	VBF5713	PENDING	864084347	Refund Generated due to adjustment on Bill #0064358636-2025-2025-0000-00	Over Assessment	5/4/2026		001	TAX	($7.01)	$0.00	($7.01)
															200	TAX	($27.41)	$0.00	($27.41)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.66)	$0.00	($0.66)
															005	TAX	($0.28)	$0.00	($0.28)
															004	TAX	($2.43)	$0.00	($2.43)
															002	TAX	($16.69)	$0.00	($16.69)
																		Refund	$54.48
MILES, MARIE NELL	MILES, MARIE NELL	MILES, DANNY	1201 LIGHTWOOD RD		WAXHAW, NC 28173	Proration	0057323474	15K5DV	AUTHORIZED	991167000	Refund Generated due to proration on Bill #0057323474-2025-2025-0000-00	Vehicle Sold	5/21/2026	5/26/2026	001	TAX	($15.04)	$0.00	($15.04)
															500	TAX	($38.83)	$0.00	($38.83)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($6.16)	$0.00	($6.16)
															003	TAX	($1.42)	$0.00	($1.42)
															005	TAX	($0.60)	$0.00	($0.60)
															004	TAX	($5.20)	$0.00	($5.20)
															002	TAX	($35.85)	$0.00	($35.85)
																		Refund	$103.10
MILLER, KENNETH ROBERT	MILLER, KENNETH ROBERT	MILLER, BARBARA MARY	1135 MEANDER LN		WAXHAW, NC 28173	Adjustment < $100	0091162241	VFL7142	PENDING	744249726	Refund Generated due to adjustment on Bill #0091162241-2025-2025-0000-00	Over Assessment	5/27/2026		001	TAX	($23.19)	$0.00	($23.19)
															028	TAX	($9.49)	$0.00	($9.49)
															003	TAX	($2.19)	$0.00	($2.19)
															005	TAX	($0.93)	$0.00	($0.93)
															004	TAX	($8.03)	$0.00	($8.03)
															002	TAX	($55.26)	$0.00	($55.26)
																		Refund	$99.09
MOORE ENTERPRISES LEASINGINC	MOORE ENTERPRISES LEASINGINC		5638 CANNON DR		MONROE, NC 28110	Adjustment < $100	0089250089	VJ8573	PENDING	863151086	Refund Generated due to adjustment on Bill #0089250089-2025-2025-0000-00	Over Assessment	5/1/2026		001	TAX	($14.61)	$0.00	($14.61)
															600	TAX	($22.10)	$0.00	($22.10)
															023	TAX	($5.55)	$0.00	($5.55)
															003	TAX	($1.38)	$0.00	($1.38)
															005	TAX	($0.58)	$0.00	($0.58)
															004	TAX	($5.06)	$0.00	($5.06)
															002	TAX	($34.81)	$0.00	($34.81)
																		Refund	$84.09

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
MORALES, NATALIE	MORALES, NATALIE		4617 HIGHWAY 74 E APT B		WINGATE, NC 28174	Adjustment < $100	0091092998	MDA6741	PENDING	991167440	Refund Generated due to adjustment on Bill #0091092998-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($15.14)	$0.00	($15.14)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															022	TAX	$2.47	$0.00	$2.47
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$42.67
MOSER, JOYCE PRESSLEY	MOSER, JOYCE PRESSLEY	MOSER, WAYNE THOMAS	3708 DUSTY HOLLOW RD		MONROE, NC 28110	Proration	0076234271	VCV8162	AUTHORIZED	741746850	Refund Generated due to proration on Bill #0076234271-2025-2025-0000-00	Vehicle Sold	5/11/2026	5/12/2026	001	TAX	($10.14)	($0.51)	($10.65)
															019	TAX	($4.48)	($0.23)	($4.71)
															003	TAX	($0.96)	($0.04)	($1.00)
															005	TAX	($0.40)	($0.02)	($0.42)
															004	TAX	($3.51)	($0.17)	($3.68)
															002	TAX	($24.16)	($1.21)	($25.37)
																		Refund	$45.83
MOZHELYUK, MAKSIM LEONIDOVICH	MOZHELYUK, MAKSIM LEONIDOVICH		1024 FARM BRANCH CT		INDIAN TRAIL, NC 28079	Adjustment < $100	0090945758	VCL6832	PENDING	1112966982	Refund Generated due to adjustment on Bill #0090945758-2025-2025-0000	Situs error	5/13/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$10.20	$0.00	$10.20
															200	TAX	($26.40)	$0.00	($26.40)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															023	TAX	$2.56	$0.00	$2.56
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$43.64
MUCKELVENE, CHARICE HUGHES	MUCKELVENE, CHARICE HUGHES		6806 WESLEY GLEN DR		WAXHAW, NC 28173	Proration	0017957666	WYW7930	AUTHORIZED	865641511	Refund Generated due to proration on Bill #0017957666-2024-2024-0000-00	Vehicle Sold	5/13/2026	5/14/2026	001	TAX	($2.59)	$0.00	($2.59)
															970	TAX	($0.26)	$0.00	($0.26)
															026	TAX	($0.63)	$0.00	($0.63)
															003	TAX	($0.28)	$0.00	($0.28)
															005	TAX	($0.06)	$0.00	($0.06)
															004	TAX	($0.46)	$0.00	($0.46)
															002	TAX	($5.95)	$0.00	($5.95)
																		Refund	$10.23
OBEID, FIRAS HICHAM	OBEID, FIRAS HICHAM		1100 WAYNEWOOD DR		WAXHAW, NC 28173	Proration	0077025930	LBD9004	AUTHORIZED	864843728	Refund Generated due to proration on Bill #0077025930-2025-2025-0000-00	Vehicle Totalled	5/8/2026	5/11/2026	001	TAX	($9.53)	$0.00	($9.53)
															970	TAX	($1.91)	$0.00	($1.91)
															026	TAX	($2.57)	$0.00	($2.57)
															003	TAX	($0.90)	$0.00	($0.90)
															005	TAX	($0.38)	$0.00	($0.38)
															004	TAX	($3.30)	$0.00	($3.30)
															002	TAX	($22.72)	$0.00	($22.72)
																		Refund	$41.31
ODAR, MANUEL ALEJANDRO	ODAR, MANUEL ALEJANDRO		2007 PARROTHEAD DR		MONROE, NC 28110	Proration	0076743843	VAE4932	AUTHORIZED	741295032	Refund Generated due to proration on Bill #0076743843-2024-2024-0000-00	Vehicle Sold	5/8/2026	5/11/2026	001	TAX	($3.59)	$0.00	($3.59)
															021	TAX	($1.49)	$0.00	($1.49)
															003	TAX	($0.39)	$0.00	($0.39)
															005	TAX	($0.09)	$0.00	($0.09)
															004	TAX	($0.64)	$0.00	($0.64)
															002	TAX	($8.24)	$0.00	($8.24)
																		Refund	$14.44
OGENE, JUDE CHIDI	OGENE, JUDE CHIDI		1602 PEARLSTONE LN		MATTHEWS, NC 28104	Proration	0063650525	JKD2855	AUTHORIZED	863150715	Refund Generated due to proration on Bill #0063650525-2025-2025-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($30.43)	$0.00	($30.43)
															800	TAX	($9.47)	$0.00	($9.47)
															026	TAX	($8.23)	$0.00	($8.23)
															003	TAX	($2.87)	$0.00	($2.87)
															005	TAX	($1.22)	$0.00	($1.22)
															004	TAX	($10.53)	$0.00	($10.53)
															002	TAX	($72.50)	$0.00	($72.50)
																		Refund	$135.25
OLIVER, JACQUELINE BULL	OLIVER, JACQUELINE BULL		5715 HILLCREST CIR		INDIAN TRAIL, NC 28079	Proration	0026576797	CLE3953	AUTHORIZED	739843674	Refund Generated due to proration on Bill #0026576797-2024-2024-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($4.68)	$0.00	($4.68)
															023	TAX	($1.47)	$0.00	($1.47)
															003	TAX	($0.50)	$0.00	($0.50)
															005	TAX	($0.11)	$0.00	($0.11)
															004	TAX	($0.84)	$0.00	($0.84)
															002	TAX	($10.74)	$0.00	($10.74)
																		Refund	$18.34
OLSON, ERIK RONALD DUANE	OLSON, ERIK RONALD DUANE		901 HIDDEN POND LN		WAXHAW, NC 28173	Proration	0088553328	1B018	AUTHORIZED	867272917	Refund Generated due to proration on Bill #0088553328-2025-2025-0000-00	Vehicle Sold	5/21/2026	5/26/2026	001	TAX	($3.28)	$0.00	($3.28)
															970	TAX	($0.66)	$0.00	($0.66)
															026	TAX	($0.89)	$0.00	($0.89)
															003	TAX	($0.31)	$0.00	($0.31)
															005	TAX	($0.13)	$0.00	($0.13)
															004	TAX	($1.14)	$0.00	($1.14)
															002	TAX	($7.81)	$0.00	($7.81)
																		Refund	$14.22

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
PANDYA, ROOPAK RAJENDRA	PANDYA, ROOPAK RAJENDRA		4306 OVERBECKS LN		WAXHAW, NC 28173	Proration	0080915953	LDC6451	AUTHORIZED	988392904	Refund Generated due to proration on Bill #0080915953-2025-2025-0000-00	Vehicle Sold	5/8/2026	5/11/2026	001	TAX	($18.12)	$0.00	($18.12)
															500	TAX	($46.75)	$0.00	($46.75)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($7.41)	$0.00	($7.41)
															003	TAX	($1.71)	$0.00	($1.71)
															005	TAX	($0.72)	$0.00	($0.72)
															004	TAX	($6.27)	$0.00	($6.27)
															002	TAX	($43.17)	$0.00	($43.17)
																		Refund	$124.15
PATTEE, CLOVIA MAY	PATTEE, CLOVIA MAY		5718 VERRAZANO DR		WAXHAW, NC 28173	Adjustment < $100	0090528570	WAH9296	PENDING	989303952	Refund Generated due to adjustment on Bill #0090528570-2025-2025-0000	Situs error	5/13/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($14.48)	$0.00	($14.48)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															015	TAX	$1.56	$0.00	$1.56
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$42.92
PATTERSON, MADDISON LEE	PATTERSON, MADDISON LEE		4408 FOX RD		LENOIR, NC 28645	Proration	0084669791	LHZ4440	AUTHORIZED	865641490	Refund Generated due to proration on Bill #0084669791-2024-2024-0000-00	Vehicle Sold	5/13/2026	5/14/2026	001	TAX	($1.25)	$0.00	($1.25)
															200	TAX	($3.84)	$0.00	($3.84)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.13)	$0.00	($0.13)
															005	TAX	($0.03)	$0.00	($0.03)
															004	TAX	($0.22)	$0.00	($0.22)
															002	TAX	($2.86)	$0.00	($2.86)
																		Refund	$8.33
PEIRANO, MARK JOSEPH	PEIRANO, MARK JOSEPH		3520 HONEYSUCKLE DR		MATTHEWS, NC 28104	Proration	0082804797	LHZ1102	AUTHORIZED	864117527	Refund Generated due to proration on Bill #0082804797-2025-2025-0000-00	Vehicle Sold	5/5/2026	5/6/2026	001	TAX	($23.83)	$0.00	($23.83)
															800	TAX	($7.42)	$0.00	($7.42)
															026	TAX	($6.44)	$0.00	($6.44)
															003	TAX	($2.25)	$0.00	($2.25)
															005	TAX	($0.95)	$0.00	($0.95)
															004	TAX	($8.25)	$0.00	($8.25)
															002	TAX	($56.78)	$0.00	($56.78)
																		Refund	$105.92
PIRELA, FREIDYS RAMON	PIRELA, FREIDYS RAMON		4000 ALICE FLAGG LN	#104	INDIAN TRAIL, NC 28079	Adjustment < $100	0090512665	WAT4752	PENDING	1112967909	Refund Generated due to adjustment on Bill #0090512665-2025-2025-0000	Situs error	5/13/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$18.58	$0.00	$18.58
															200	TAX	($48.09)	$0.00	($48.09)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															023	TAX	$4.67	$0.00	$4.67
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$54.84
POWELL, STEPHEN ALEXANDER	POWELL, STEPHEN ALEXANDER		2100 COTTON MILL CT		MATTHEWS, NC 28104	Proration	0084088883	3852VA	AUTHORIZED	864625762	Refund Generated due to proration on Bill #0084088883-2024-2024-0000-00	Vehicle Sold	5/7/2026	5/8/2026	001	TAX	($16.85)	$0.00	($16.85)
															700	TAX	($22.31)	$0.00	($22.31)
															023	TAX	($5.29)	$0.00	($5.29)
															003	TAX	($1.81)	$0.00	($1.81)
															005	TAX	($0.40)	$0.00	($0.40)
															004	TAX	($3.01)	$0.00	($3.01)
															002	TAX	($38.64)	$0.00	($38.64)
																		Refund	$88.31
PRICE, VIRGINA PREVATTE	PRICE, VIRGINA PREVATTE	GASKINS, SHIRLEY MARIE	113 S FOREST HILLS SCHOOL RD		MARSHVILLE, NC 28103	Adjustment < $100	0090545109	MDA6002	PENDING	989584080	Refund Generated due to adjustment on Bill #0090545109-2025-2025-0000	Situs error	5/14/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($73.35)	$0.00	($73.35)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															022	TAX	$11.99	$0.00	$11.99
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$91.36
PURDON, ETHAN PATRICK	PURDON, ETHAN PATRICK		7601 RADIN RD		WAXHAW, NC 28173	Adjustment < $100	0091002698	MDA5977	PENDING	991167504	Refund Generated due to adjustment on Bill #0091002698-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($22.40)	$0.00	($22.40)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															028	TAX	$2.34	$0.00	$2.34
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$50.06

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
RAPE, ISAIAH LEE	RAPE, ISAIAH LEE		1208 EAST SANDY RIDGE RE		MONROE, NC 28112	Adjustment < $100	0091045219	WBD7180	PENDING	991167432	Refund Generated due to adjustment on Bill #0091045219-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($7.83)	$0.00	($7.83)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															014	TAX	$0.78	$0.00	$0.78
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$37.05
RATHS, RHONDA LYNN	RATHS, RHONDA LYNN		6128 HAWK VIEW RD		WAXHAW, NC 28173	Proration	0070201223	KDM6725	AUTHORIZED	741766794	Refund Generated due to proration on Bill #0070201223-2025-2025-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($17.47)	$0.00	($17.47)
															025	TAX	($6.93)	$0.00	($6.93)
															003	TAX	($1.65)	$0.00	($1.65)
															005	TAX	($0.70)	$0.00	($0.70)
															004	TAX	($6.04)	$0.00	($6.04)
															002	TAX	($41.62)	$0.00	($41.62)
																		Refund	$74.41
RICHARDSON, JAMES TYLER	RICHARDSON, JAMES TYLER		2410 FALCON LN		MONROE, NC 28110	Proration	0081352334	LEN4247	AUTHORIZED	865394607	Refund Generated due to proration on Bill #0081352334-2025-2025-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($13.64)	$0.00	($13.64)
															980	TAX	($2.43)	$0.00	($2.43)
															021	TAX	($6.55)	$0.00	($6.55)
															003	TAX	($1.28)	$0.00	($1.28)
															005	TAX	($0.55)	$0.00	($0.55)
															004	TAX	($4.72)	$0.00	($4.72)
															002	TAX	($32.49)	$0.00	($32.49)
																		Refund	$61.66
ROGERS, JAMES MATTHEW	ROGERS, JAMES MATTHEW		407 E OLD HIGHWAY 74		MONROE, NC 28112	Proration	0090934152	WBD7156	AUTHORIZED	868997752	Refund Generated due to proration on Bill #0090934152-2025-2025-0000-00	Vehicle Sold	5/29/2026	6/1/2026	001	TAX	($0.82)	$0.00	($0.82)
															200	TAX	($3.23)	$0.00	($3.23)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.07)	$0.00	($0.07)
															005	TAX	($0.04)	$0.00	($0.04)
															004	TAX	($0.28)	$0.00	($0.28)
															002	TAX	($1.96)	$0.00	($1.96)
																		Refund	$6.40
ROSE, EMILY ELLEN	ROSE, EMILY ELLEN		1014 EXODUS CT		MONROE, NC 28110	Proration	0059407092	THC8786	AUTHORIZED	868635922	Refund Generated due to proration on Bill #0059407092-2024-2024-0000-00	Vehicle Sold	5/28/2026	5/29/2026	001	TAX	($2.25)	$0.00	($2.25)
															600	TAX	($2.55)	$0.00	($2.55)
															019	TAX	($0.88)	$0.00	($0.88)
															003	TAX	($0.24)	$0.00	($0.24)
															005	TAX	($0.05)	$0.00	($0.05)
															004	TAX	($0.40)	$0.00	($0.40)
															002	TAX	($5.15)	$0.00	($5.15)
																		Refund	$11.52
ROZLYVANOV, DMYTRO	ROZLYVANOV, DMYTRO		708 WINDING BROOK RD		MONROE, NC 28112	Proration	0078123807	TZ4984	AUTHORIZED	744194484	Refund Generated due to proration on Bill #0078123807-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($30.56)	$0.00	($30.56)
															013	TAX	($4.70)	$0.00	($4.70)
															003	TAX	($2.88)	$0.00	($2.88)
															005	TAX	($1.22)	$0.00	($1.22)
															004	TAX	($10.58)	$0.00	($10.58)
															002	TAX	($72.81)	$0.00	($72.81)
																		Refund	$122.75
SAEED, HASHIM	SAEED, HASHIM		3648 PRIVETTE RD		MATTHEWS, NC 28104	Proration	0077274356	KJK2709	AUTHORIZED	863150974	Refund Generated due to proration on Bill #0077274356-2024-2024-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($18.15)	$0.00	($18.15)
															700	TAX	($24.03)	$0.00	($24.03)
															020	TAX	($5.95)	$0.00	($5.95)
															003	TAX	($1.95)	$0.00	($1.95)
															005	TAX	($0.43)	$0.00	($0.43)
															004	TAX	($3.25)	$0.00	($3.25)
															002	TAX	($41.63)	$0.00	($41.63)
																		Refund	$95.39
SAILER, RYLEIGH BROOKE	SAILER, RYLEIGH BROOKE		4810 VON CT		MONROE, NC 28110	Adjustment < $100	0091225582	WBC7810	PENDING	1116291024	Refund Generated due to adjustment on Bill #0091225582-2025-2025-0000	Situs error	5/26/2026		001	TAX	$0.00	$0.00	$0.00
															600	TAX	$19.41	$0.00	$19.41
															200	TAX	($50.25)	$0.00	($50.25)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															019	TAX	$5.66	$0.00	$5.66
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$55.18
SAMANIEGO, ERIC RICARDO	SAMANIEGO, ERIC RICARDO		2542 TILLMAN ST		MONROE, NC 28112	Proration	0080889889	KMT9445	AUTHORIZED	864625706	Refund Generated due to proration on Bill #0080889889-2025-2025-0000-00	Vehicle Sold	5/7/2026	5/8/2026	001	TAX	($13.64)	$0.00	($13.64)
															200	TAX	($53.39)	$0.00	($53.39)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.28)	$0.00	($1.28)
															005	TAX	($0.55)	$0.00	($0.55)
															004	TAX	($4.72)	$0.00	($4.72)
															002	TAX	($32.49)	$0.00	($32.49)
																		Refund	$106.07

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
SANDHU, ROBIN SINGH	SANDHU, ROBIN SINGH		9123 UNBRIDLE LN		WAXHAW, NC 28173	Proration	0071346191	KBN8323	AUTHORIZED	741294720	Refund Generated due to proration on Bill #0071346191-2024-2024-0000-00	Vehicle Sold	5/8/2026	5/11/2026	001	TAX	($1.70)	$0.00	($1.70)
															026	TAX	($0.41)	$0.00	($0.41)
															003	TAX	($0.18)	$0.00	($0.18)
															005	TAX	($0.04)	$0.00	($0.04)
															004	TAX	($0.30)	$0.00	($0.30)
															002	TAX	($3.90)	$0.00	($3.90)
																		Refund	$6.53
SEABOLT, LARRY SETH	SEABOLT, LARRY SETH		5531 W. M. GRIFFIN RD		MONROE, NC 28112	Adjustment < $100	0091176763	WBJ9982	PENDING	991167464	Refund Generated due to adjustment on Bill #0091176763-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($16.98)	$0.00	($16.98)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															029	TAX	$1.03	$0.00	$1.03
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$45.95
SENCION, DIANA MARIA	SENCION, DIANA MARIA		206 ASPIRE CIR		WINGATE, NC 28174	Proration	0087835532	LKW3724	AUTHORIZED	989024000	Refund Generated due to proration on Bill #0087835532-2025-2025-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($22.75)	$0.00	($22.75)
															300	TAX	($50.60)	$0.00	($50.60)
															300	VEHICLE FEE	$0.00	$0.00	$0.00
															022	TAX	($14.56)	$0.00	($14.56)
															003	TAX	($2.14)	$0.00	($2.14)
															005	TAX	($0.91)	$0.00	($0.91)
															004	TAX	($7.87)	$0.00	($7.87)
															002	TAX	($54.20)	$0.00	($54.20)
																		Refund	$153.03
SHADRINA, VALERIIA SERGEYE	SHADRINA, VALERIIA SERGEYE		4910 TRADD CIR		MONROE, NC 28110	Proration	0086689558	LKP3399	AUTHORIZED	866742793	Refund Generated due to proration on Bill #0086689558-2025-2025-0000-00	Vehicle Totalled	5/19/2026	5/21/2026	001	TAX	($11.64)	$0.00	($11.64)
															200	TAX	($45.58)	$0.00	($45.58)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.10)	$0.00	($1.10)
															005	TAX	($0.46)	$0.00	($0.46)
															004	TAX	($4.03)	$0.00	($4.03)
															002	TAX	($27.74)	$0.00	($27.74)
																		Refund	$90.55
SHEA, BRENDAN PETER	SHEA, BRENDAN PETER		811 ARMFIELD ST		WAXHAW, NC 28173	Proration	0090613110	LBJ8388	AUTHORIZED	744193614	Refund Generated due to proration on Bill #0090613110-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($27.06)	$0.00	($27.06)
															015	TAX	($11.41)	$0.00	($11.41)
															003	TAX	($2.55)	$0.00	($2.55)
															005	TAX	($1.08)	$0.00	($1.08)
															004	TAX	($9.37)	$0.00	($9.37)
															002	TAX	($64.46)	$0.00	($64.46)
																		Refund	$115.93
SHIPLEY, PHILLIP CARL JR	SHIPLEY, PHILLIP CARL JR	SHIPLEY, MELANIE JANE	8108 RED OAKS TRL		WAXHAW, NC 28173	Proration	0074970273	REC1291	AUTHORIZED	988143680	Refund Generated due to proration on Bill #0074970273-2025-2025-0000-00	Vehicle Totalled	5/7/2026	5/8/2026	001	TAX	($32.52)	$0.00	($32.52)
															500	TAX	($83.91)	$0.00	($83.91)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($13.31)	$0.00	($13.31)
															003	TAX	($3.07)	$0.00	($3.07)
															005	TAX	($1.30)	$0.00	($1.30)
															004	TAX	($11.26)	$0.00	($11.26)
															002	TAX	($77.49)	$0.00	($77.49)
																		Refund	$222.86
SIDDENKI, SHRAVAN KUMAR REDDY	SIDDENKI, SHRAVAN KUMAR REDDY		221 YELLOW BIRCH DR		INDIAN TRAIL, NC 28079	Proration	0080853426	9J7401	AUTHORIZED	865394628	Refund Generated due to proration on Bill #0080853426-2025-2025-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($6.89)	$0.00	($6.89)
															600	TAX	($10.42)	$0.00	($10.42)
															020	TAX	($2.83)	$0.00	($2.83)
															003	TAX	($0.65)	$0.00	($0.65)
															005	TAX	($0.27)	$0.00	($0.27)
															004	TAX	($2.38)	$0.00	($2.38)
															002	TAX	($16.42)	$0.00	($16.42)
																		Refund	$39.86
SOFIO, WILLIAM	SOFIO, WILLIAM		314 SKYECROFT WAY		WAXHAW, NC 28173	Proration	0058051342	FKH3133	AUTHORIZED	742188498	Refund Generated due to proration on Bill #0058051342-2025-2025-0000-00	Vehicle Sold	5/14/2026	5/15/2026	001	TAX	($9.82)	$0.00	($9.82)
															026	TAX	($2.65)	$0.00	($2.65)
															003	TAX	($0.92)	$0.00	($0.92)
															005	TAX	($0.39)	$0.00	($0.39)
															004	TAX	($3.40)	$0.00	($3.40)
															002	TAX	($23.40)	$0.00	($23.40)
																		Refund	$40.58
SPRINGS, SANDRA PARKER	SPRINGS, SANDRA PARKER	SPRINGS, BRUCE EDWARD	PO BOX 78931		CHARLOTTE, NC 28271	Proration	0031935771	YPF2668	AUTHORIZED	863151058	Refund Generated due to proration on Bill #0031935771-2024-2024-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($10.47)	$0.00	($10.47)
															600	TAX	($11.87)	$0.00	($11.87)
															020	TAX	($3.43)	$0.00	($3.43)
															003	TAX	($1.12)	$0.00	($1.12)
															005	TAX	($0.25)	$0.00	($0.25)
															004	TAX	($1.87)	$0.00	($1.87)
															002	TAX	($24.01)	$0.00	($24.01)
																		Refund	$53.02

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
SRIVASTAVA, PUNEET	SRIVASTAVA, PUNEET		4472 FAMILY TRAIL DR		INDIAN LAND, SC 29707	Proration	0090320602	WAT7274	AUTHORIZED	864843833	Refund Generated due to proration on Bill #0090320602-2025-2025-0000-00	Vehicle Sold	5/8/2026	5/11/2026	001	TAX	($13.05)	$0.00	($13.05)
															200	TAX	($51.07)	$0.00	($51.07)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($1.23)	$0.00	($1.23)
															005	TAX	($0.52)	$0.00	($0.52)
															004	TAX	($4.52)	$0.00	($4.52)
															002	TAX	($31.08)	$0.00	($31.08)
																		Refund	$101.47
STACK, TIMOTHY GERARD	STACK, TIMOTHY GERARD		1031 SEVEN SISTERS AVE		MONROE, NC 28110	Proration	0080749398	RHP3271	AUTHORIZED	744195300	Refund Generated due to proration on Bill #0080749398-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($35.74)	$0.00	($35.74)
															015	TAX	($15.07)	$0.00	($15.07)
															003	TAX	($3.37)	$0.00	($3.37)
															005	TAX	($1.43)	$0.00	($1.43)
															004	TAX	($12.37)	$0.00	($12.37)
															002	TAX	($85.17)	$0.00	($85.17)
																		Refund	$153.15
STANFORD, JOSEPH DUSTIN	STANFORD, JOSEPH DUSTIN		2709 LATHAN RD		MONROE, NC 28112	Proration	0086712754	KM9691	AUTHORIZED	743151528	Refund Generated due to proration on Bill #0086712754-2025-2025-0000-00	Vehicle Sold	5/20/2026	5/21/2026	001	TAX	($5.46)	($0.27)	($5.73)
															029	TAX	($1.30)	($0.07)	($1.37)
															003	TAX	($0.51)	($0.03)	($0.54)
															005	TAX	($0.22)	($0.01)	($0.23)
															004	TAX	($1.89)	($0.09)	($1.98)
															002	TAX	($13.01)	($0.65)	($13.66)
																		Refund	$23.51
STONE, STEPHEN KELLY	STONE, STEPHEN KELLY		5915 HWU 205		MARSHVILLE, NC 28103	Adjustment < $100	0090553663	WAW3180	PENDING	987563840	Refund Generated due to adjustment on Bill #0090553663-2025-2025-0000	Situs error	5/5/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($67.63)	$0.00	($67.63)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															017	TAX	$10.96	$0.00	$10.96
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$86.67
SWANSON, STEPHEN PAUL	SWANSON, STEPHEN PAUL		8107 SKYE LOCHS DR		WAXHAW, NC 28173	Proration	0075802529	JCC5497	AUTHORIZED	740901786	Refund Generated due to proration on Bill #0075802529-2025-2025-0000-00	Vehicle Sold	5/6/2026	5/7/2026	001	TAX	($42.28)	$0.00	($42.28)
															026	TAX	($11.43)	$0.00	($11.43)
															003	TAX	($3.99)	$0.00	($3.99)
															005	TAX	($1.70)	$0.00	($1.70)
															004	TAX	($14.63)	$0.00	($14.63)
															002	TAX	($100.72)	$0.00	($100.72)
																		Refund	$174.75
SYAL, RASHMI	SYAL, RASHMI		15642 CANMORE ST		CHARLOTTE, NC 28277	Proration	0079440825	RHN8211	AUTHORIZED	744193644	Refund Generated due to proration on Bill #0079440825-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($17.62)	$0.00	($17.62)
															015	TAX	($7.43)	$0.00	($7.43)
															003	TAX	($1.66)	$0.00	($1.66)
															005	TAX	($0.70)	$0.00	($0.70)
															004	TAX	($6.10)	$0.00	($6.10)
															002	TAX	($41.98)	$0.00	($41.98)
																		Refund	$75.49
TAYLOR, THOMAS EDWARD	TAYLOR, THOMAS EDWARD	TAYLOR, BONNIE ALEXANDER	910 APPLEGATE PKWY		WAXHAW, NC 28173	Proration	0078428478	SNZ1707	AUTHORIZED	865394740	Refund Generated due to proration on Bill #0078428478-2024-2024-0000-00	Vehicle Sold	5/12/2026	5/13/2026	001	TAX	($6.14)	$0.00	($6.14)
															970	TAX	($0.62)	$0.00	($0.62)
															026	TAX	($1.50)	$0.00	($1.50)
															003	TAX	($0.66)	$0.00	($0.66)
															005	TAX	($0.15)	$0.00	($0.15)
															004	TAX	($1.10)	$0.00	($1.10)
															002	TAX	($14.08)	$0.00	($14.08)
																		Refund	$24.25
TCHIKABERIDZE, DAVITI	TCHIKABERIDZE, DAVITI		6602 CONIFER CIR		INDIAN TRAIL, NC 28079	Proration	0087936965	FMX8776	AUTHORIZED	864843812	Refund Generated due to proration on Bill #0087936965-2025-2025-0000-00	Vehicle Sold	5/8/2026	5/11/2026	001	TAX	($11.57)	$0.00	($11.57)
															900	TAX	($16.48)	$0.00	($16.48)
															023	TAX	($4.39)	$0.00	($4.39)
															003	TAX	($1.09)	$0.00	($1.09)
															005	TAX	($0.46)	$0.00	($0.46)
															004	TAX	($4.00)	$0.00	($4.00)
															002	TAX	($27.58)	$0.00	($27.58)
																		Refund	$65.57
THOMAS, VICKY LYNN	WILLIAMS, VICKY LYNN		333 ROBINSON AVE		MATTHEWS, NC 28104	Proration	0016606079	JDR6472	AUTHORIZED	866111085	Refund Generated due to proration on Bill #0016606079-2025-2025-0000-00	Vehicle Totalled	5/15/2026	5/18/2026	001	TAX	($6.57)	$0.00	($6.57)
															600	TAX	($9.95)	$0.00	($9.95)
															020	TAX	($2.70)	$0.00	($2.70)
															003	TAX	($0.62)	$0.00	($0.62)
															005	TAX	($0.27)	$0.00	($0.27)
															004	TAX	($2.27)	$0.00	($2.27)
															002	TAX	($15.67)	$0.00	($15.67)
																		Refund	$38.05
UPADHYAY, RINA	UPADHYAY, RINA	UPADHYAY, AJAY RAJ	2014 PUDDLE POND RD		INDIAN TRAIL, NC 28079	Proration	0088128685	LMH5605	AUTHORIZED	865370856	Refund Generated due to proration on Bill #0088128685-2025-2025-0000-00	Vehicle Sold	5/11/2026	5/12/2026	001	TAX	($7.51)	$0.00	($7.51)
															600	TAX	($11.36)	$0.00	($11.36)
															020	TAX	($3.09)	$0.00	($3.09)
															003	TAX	($0.71)	$0.00	($0.71)
															005	TAX	($0.30)	$0.00	($0.30)
															004	TAX	($2.60)	$0.00	($2.60)
															002	TAX	($17.90)	$0.00	($17.90)
																		Refund	$43.47

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
VAZQUEZ-GONZALEZ, ALLAN KEVIN	VAZQUEZ-GONZALEZ, ALLAN KEVIN		5315 REID RD		INDIAN TRAIL, NC 28079	Adjustment < $100	0091297235	MCH4551	PENDING	744854544	Refund Generated due to adjustment on Bill #0091297235-2025-2025-0000-00	SLVG or RBLT TTL	5/29/2026		001	TAX	($12.99)	$0.00	($12.99)
															023	TAX	($4.94)	$0.00	($4.94)
															003	TAX	($1.22)	$0.00	($1.22)
															005	TAX	($0.52)	$0.00	($0.52)
															004	TAX	($4.49)	$0.00	($4.49)
															002	TAX	($30.95)	$0.00	($30.95)
																		Refund	$55.11
VAZQUEZ-GONZALEZ, ALLAN KEVIN	VAZQUEZ-GONZALEZ, ALLAN KEVIN		5315 REID RD		INDIAN TRAIL, NC 28079	Adjustment < $100	0091296964	MCH4550	PENDING	744854556	Refund Generated due to adjustment on Bill #0091296964-2025-2025-0000-00	Over Assessment	5/29/2026		001	TAX	($2.06)	$0.00	($2.06)
															023	TAX	($0.78)	$0.00	($0.78)
															003	TAX	($0.19)	$0.00	($0.19)
															005	TAX	($0.08)	$0.00	($0.08)
															004	TAX	($0.71)	$0.00	($0.71)
															002	TAX	($4.91)	$0.00	($4.91)
																		Refund	$8.73
VOLC, TATIANA	VOLC, TATIANA		4329 POPLIN GROVE DR		INDIAN TRAIL, NC 28079	Proration	0083771703	VFL5892	AUTHORIZED	865371073	Refund Generated due to proration on Bill #0083771703-2024-2024-0000-00	Vehicle Sold	5/11/2026	5/12/2026	001	TAX	($2.37)	$0.00	($2.37)
															200	TAX	($7.29)	$0.00	($7.29)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($0.25)	$0.00	($0.25)
															005	TAX	($0.06)	$0.00	($0.06)
															004	TAX	($0.42)	$0.00	($0.42)
															002	TAX	($5.42)	$0.00	($5.42)
																		Refund	$15.81
WALSH, KELLY LEIGH	WALSH, KELLY LEIGH		5444 REDBUD RD		LANCASTER, SC 29720	Proration	0069604277	JJW5866	AUTHORIZED	992260896	Refund Generated due to proration on Bill #0069604277-2025-2025-0000-00	Reg . Out of state	5/26/2026	5/27/2026	001	TAX	($14.82)	$0.00	($14.82)
															500	TAX	($38.26)	$0.00	($38.26)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($6.07)	$0.00	($6.07)
															003	TAX	($1.40)	$0.00	($1.40)
															005	TAX	($0.59)	$0.00	($0.59)
															004	TAX	($5.13)	$0.00	($5.13)
															002	TAX	($35.32)	$0.00	($35.32)
																		Refund	$101.59
WALSH, KELLY LEIGH	WALSH, KELLY LEIGH		5444 REDBUD RD		LANCASTER, SC 29720	Proration	0085283791	CLV8341	AUTHORIZED	992260904	Refund Generated due to proration on Bill #0085283791-2024-2024-0000-00	Reg . Out of state	5/26/2026	5/27/2026	001	TAX	($13.71)	($0.80)	($14.51)
															500	TAX	($32.35)	($1.86)	($34.21)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($4.39)	($0.25)	($4.64)
															003	TAX	($1.47)	($0.08)	($1.55)
															005	TAX	($0.33)	($0.02)	($0.35)
															004	TAX	($2.45)	($0.14)	($2.59)
															002	TAX	($31.45)	($1.80)	($33.25)
																		Refund	$91.10
WEAVER, RICKY LEE	WEAVER, RICKY LEE	WEAVER, TERESA HARDEE	6021 BICKETT RIDGE DR		MONROE, NC 28110	Proration	0089934592	REX2373	AUTHORIZED	741107736	Refund Generated due to proration on Bill #0089934592-2025-2025-0000-00	Vehicle Sold	5/7/2026	5/8/2026	001	TAX	($37.27)	$0.00	($37.27)
															021	TAX	($17.90)	$0.00	($17.90)
															003	TAX	($3.51)	$0.00	($3.51)
															005	TAX	($1.49)	$0.00	($1.49)
															004	TAX	($12.90)	$0.00	($12.90)
															002	TAX	($88.79)	$0.00	($88.79)
																		Refund	$161.86
WELTI, CRAIG JUSTIN	WELTI, CRAIG JUSTIN	WELTI, JUDY AUSTIN	2337 WHISPERING WAY		INDIAN TRAIL, NC 28079	Proration	0062226187	TAH9118	AUTHORIZED	868228046	Refund Generated due to proration on Bill #0062226187-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($11.25)	$0.00	($11.25)
															600	TAX	($17.02)	$0.00	($17.02)
															020	TAX	($4.62)	$0.00	($4.62)
															003	TAX	($1.06)	$0.00	($1.06)
															005	TAX	($0.45)	$0.00	($0.45)
															004	TAX	($3.89)	$0.00	($3.89)
															002	TAX	($26.82)	$0.00	($26.82)
																		Refund	$65.11
WELTI, JUDY AUSTIN	WELTI, JUDY AUSTIN	WELTI, CRAIG JUSTIN	2337 WHISPERING WAY		INDIAN TRAIL, NC 28079	Proration	0055747231	TAH9119	AUTHORIZED	868227920	Refund Generated due to proration on Bill #0055747231-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($7.31)	$0.00	($7.31)
															600	TAX	($11.06)	$0.00	($11.06)
															020	TAX	($3.01)	$0.00	($3.01)
															003	TAX	($0.69)	$0.00	($0.69)
															005	TAX	($0.29)	$0.00	($0.29)
															004	TAX	($2.53)	$0.00	($2.53)
															002	TAX	($17.43)	$0.00	($17.43)
																		Refund	$42.32
WIEGMAN, DAVID BOAZ ELDERS	WIEGMAN, DAVID BOAZ ELDERS		7601 RADIN RD		WAXHAW, NC 28173	Adjustment < $100	0091169508	MDA6788	PENDING	991167520	Refund Generated due to adjustment on Bill #0091169508-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($42.59)	$0.00	($42.59)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															028	TAX	$4.45	$0.00	$4.45
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$68.14

North Carolina Vehicle Tax System

Pending Refund Report

Payee Name	Primary Owner	Secondary Owner	Address 1	Address 2	Address 3	Refund Type	Bill #	Plate Number	Status	Transaction #	Refund Description	Refund Reason	Create Date	Authorization Date	Tax Jurisdiction	Levy Type	Change	Interest Change	Total Change
WIEGMAN, DAVID BOAZ ELDERS	WIEGMAN, DAVID BOAZ ELDERS		7601 RADIN RD		WAXHAW, NC 28173	Adjustment < $100	0088802381	LMT8117	PENDING	991167528	Refund Generated due to adjustment on Bill #0088802381-2025-2025-0000	Situs error	5/21/2026		001	TAX	$0.00	$0.00	$0.00
															200	TAX	($11.00)	$0.00	($11.00)
															200	VEHICLE FEE	($30.00)	$0.00	($30.00)
															028	TAX	$1.15	$0.00	$1.15
															003	TAX	$0.00	$0.00	$0.00
															005	TAX	$0.00	$0.00	$0.00
															004	TAX	$0.00	$0.00	$0.00
															002	TAX	$0.00	$0.00	$0.00
																		Refund	$39.85
WILCOX, KIMBERLY LEIGH	WILCOX, KIMBERLY LEIGH		3322 N ROCKY RIVER RD		MONROE, NC 28110	Proration	0069186588	TFW2477	AUTHORIZED	864085432	Refund Generated due to proration on Bill #0069186588-2025-2025-0000-00	Vehicle Sold	5/4/2026	5/5/2026	001	TAX	($32.23)	$0.00	($32.23)
															200	TAX	($126.17)	$0.00	($126.17)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($3.04)	$0.00	($3.04)
															005	TAX	($1.29)	$0.00	($1.29)
															004	TAX	($11.16)	$0.00	($11.16)
															002	TAX	($76.79)	$0.00	($76.79)
																		Refund	$250.68
WILHELM, JAMES EDWARDS	WILHELM, JAMES EDWARDS		2615 ROLLING HILLS DR		MONROE, NC 28110	Proration	0088243016	9562VV	AUTHORIZED	863150911	Refund Generated due to proration on Bill #0088243016-2025-2025-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($22.28)	$0.00	($22.28)
															200	TAX	($87.22)	$0.00	($87.22)
															200	VEHICLE FEE	$0.00	$0.00	$0.00
															003	TAX	($2.10)	$0.00	($2.10)
															005	TAX	($0.89)	$0.00	($0.89)
															004	TAX	($7.71)	$0.00	($7.71)
															002	TAX	($53.08)	$0.00	($53.08)
																		Refund	$173.28
WU, CHARLES CHENGZHI	WU, CHARLES CHENGZHI		3503 MCPHERSON ST		WAXHAW, NC 28173	Proration	0026683732	PFP5368	AUTHORIZED	992332992	Refund Generated due to proration on Bill #0026683732-2024-2024-0000-00	Vehicle Totalled	5/27/2026	5/28/2026	001	TAX	($1.12)	$0.00	($1.12)
															500	TAX	($2.65)	$0.00	($2.65)
															500	VEHICLE FEE	$0.00	$0.00	$0.00
															028	TAX	($0.36)	$0.00	($0.36)
															003	TAX	($0.12)	$0.00	($0.12)
															005	TAX	($0.03)	$0.00	($0.03)
															004	TAX	($0.20)	$0.00	($0.20)
															002	TAX	($2.57)	$0.00	($2.57)
																		Refund	$7.05
WYANT, GREGORY ERICH	WYANT, GREGORY ERICH	WYANT, CAROL CARTER	709 EAGLE POINT CT		WEDDINGTON, NC 28104	Proration	0045797672	7086BC	AUTHORIZED	868225869	Refund Generated due to proration on Bill #0045797672-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($28.11)	$0.00	($28.11)
															800	TAX	($8.75)	$0.00	($8.75)
															026	TAX	($7.61)	$0.00	($7.61)
															003	TAX	($2.65)	$0.00	($2.65)
															005	TAX	($1.13)	$0.00	($1.13)
															004	TAX	($9.73)	$0.00	($9.73)
															002	TAX	($66.99)	$0.00	($66.99)
																		Refund	$124.97
ZEMAK, WILLIAM HARRY	ZEMAK, WILLIAM HARRY	ZEMAK, BARBARA MARIE	4005 HONEYBROOK CT		MONROE, NC 28110	Proration	0089193763	RDS3619	AUTHORIZED	868228494	Refund Generated due to proration on Bill #0089193763-2025-2025-0000-00	Vehicle Sold	5/26/2026	5/27/2026	001	TAX	($72.88)	$0.00	($72.88)
															970	TAX	($14.59)	$0.00	($14.59)
															026	TAX	($19.71)	$0.00	($19.71)
															003	TAX	($6.87)	$0.00	($6.87)
															005	TAX	($2.92)	$0.00	($2.92)
															004	TAX	($25.22)	$0.00	($25.22)
															002	TAX	($173.63)	$0.00	($173.63)
																		Refund	$315.82
ZINGER, STEVEN LOUIS	ZINGER, STEVEN LOUIS		1737 CAVAILLON DR		WAXHAW, NC 28173	Proration	0086309763	JHE1595	AUTHORIZED	739843710	Refund Generated due to proration on Bill #0086309763-2024-2024-0000-00	Vehicle Sold	5/1/2026	5/4/2026	001	TAX	($6.91)	$0.00	($6.91)
															026	TAX	($1.69)	$0.00	($1.69)
															003	TAX	($0.74)	$0.00	($0.74)
															005	TAX	($0.16)	$0.00	($0.16)
															004	TAX	($1.24)	$0.00	($1.24)
															002	TAX	($15.85)	$0.00	($15.85)
																		Refund	$26.59
																		Refund Total	$11754.79

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Center
500 North Main Street
Monroe, North Carolina
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File #: 26-366 **Agenda Date:** 7/20/2026

TITLE:

Tax Collector's Departmental Report for May 2026

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

This report reflects the totals of all tax transactions within the Tax Collector's Office for the month of May 2026 as required by NCGS 105-350(7).

FINANCIAL IMPACT:

None.

UNION COUNTY
north carolina

Memorandum

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

From: Vann Harrell
Tax Administrator

Date: June 12, 2026

Re: Departmental Monthly Report

The Tax Collector's monthly/year to date collections report for the month ending May 29, 2026 is attached for your information and review.

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

Attachment

VH/JM

Tax Administration | Revenue Division
500 North Main Street, Suite 119
Monroe, NC 28112
T 704-283-3848

MAY 2026
PERCENTAGE FOR REGULAR TAX

MAY 29, 2026 REGULAR TAX	2026	2025	2024	2023	2022
BEGINNING CHARGE	646,813.97	274,842,975.34	237,287,862.91	226,221,110.28	217,100,071.58
TAX CHARGE					
PUBLIC UTILITIES CHARGE					
DISCOVERIES	39,182.60				
NON DISCOVERIES	102,859.23	45,903.51	29,298.08	28,994.50	10,848.96
RELEASES	(3,755.53)	(3,091.80)	(81.20)	(38.32)	
TOTAL CHARGE	**785,100.27**	**274,885,787.05**	**237,317,079.79**	**226,250,066.46**	**217,110,920.54**
BEGINNING COLLECTIONS	142,681.51	274,103,108.35	237,146,562.38	226,143,668.21	217,051,244.15
COLLECTIONS	17,102.86	298,318.62	13,525.01	9,446.35	2,523.50
TOTAL COLLECTIONS	**159,784.37**	**274,401,426.97**	**237,160,087.39**	**226,153,114.56**	**217,053,767.65**
BALANCE OUTSTANDING	625,315.90	484,360.08	156,992.40	96,951.90	57,152.89
PERCENTAGE OF REGULAR	**20.35%**	**99.82%**	**99.93%**	**99.96%**	**99.97%**
OVERALL CHARGED	**785,100.27**	**274,885,787.05**	**237,317,079.79**	**226,250,066.46**	**217,110,920.54**
OVERALL COLLECTED	**159,784.37**	**274,401,426.97**	**237,160,087.39**	**226,153,114.56**	**217,053,767.65**
OVERALL PERCENTAGE	**20.35%**	**99.82%**	**99.93%**	**99.96%**	**99.97%**

MAY 2026
PERCENTAGE FOR REGULAR TAX

MAY 29, 2026 REGULAR TAX	2021	2020	2019	2018
BEGINNING CHARGE	208,193,009.77	192,180,923.17	186,540,147.30	180,717,811.44
TAX CHARGE				
PUBLIC UTILITIES CHARGE				
DISCOVERIES				
NON DISCOVERIES				
RELEASES				
TOTAL CHARGE	**208,193,009.77**	**192,180,923.17**	**186,540,147.30**	**180,717,811.44**
BEGINNING COLLECTIONS	208,146,170.10	192,113,814.79	186,445,802.33	180,662,710.96
COLLECTIONS	1,164.37	244.57	245.97	253.98
TOTAL COLLECTIONS	**208,147,334.47**	**192,114,059.36**	**186,446,048.30**	**180,662,964.94**
BALANCE OUTSTANDING	45,675.30	66,863.81	94,099.00	54,846.50
PERCENTAGE OF REGULAR	**99.98%**	**99.97%**	**99.95%**	**99.97%**
OVERALL CHARGED	**208,193,009.77**	**192,180,923.17**	**186,540,147.30**	**180,717,811.44**
OVERALL COLLECTED	**208,147,334.47**	**192,114,059.36**	**186,446,048.30**	**180,662,964.94**
OVERALL PERCENTAGE	**99.98%**	**99.97%**	**99.95%**	**99.97%**

MAY 2026
PERCENTAGE FOR REGULAR TAX

MAY 29, 2026 REGULAR TAX	2017	2016
BEGINNING CHARGE	186,663,147.61	176,859,604.37
TAX CHARGE		
PUBLIC UTILITIES CHARGE		
DISCOVERIES		
NON DISCOVERIES		
RELEASES		
TOTAL CHARGE	**186,663,147.61**	**176,859,604.37**
BEGINNING COLLECTIONS	186,618,340.30	176,823,181.35
COLLECTIONS	256.37	307.44
TOTAL COLLECTIONS	**186,618,596.67**	**176,823,488.79**
BALANCE OUTSTANDING	44,550.94	36,115.58
PERCENTAGE OF REGULAR	**99.98%**	**99.98%**
OVERALL CHARGED	**186,663,147.61**	**176,859,604.37**
OVERALL COLLECTED	**186,618,596.67**	**176,823,488.79**
OVERALL PERCENTAGE	**99.98%**	**99.98%**

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Monroe, North Carolina
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File #: 26-383 **Agenda Date:** 7/20/2026

TITLE:

Human Resources Reports for May 2026

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

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

FINANCIAL IMPACT:

None.

UNION COUNTY PERSONNEL REPORT
REPORT OF NEW HIRES

May 2026

Name	Hire Date	Position
911 COMMUNICATIONS		
HOLLY R DILL	5/18/26	TELECOMMUNICATOR I
YESENIA I PEREZ	5/18/26	TELECOMMUNICATOR I
COOPERATIVE EXTENSION		
SABRINAH F HARTSELL	5/20/26	INTERN
KAYLEE L KEETER	5/20/26	INTERN
FINANCE		
ARIESWATY TANGGANI	5/4/26	ACCOUNTANT
HS - BUSINESS OPERATIONS		
BELINDA FORTY	5/4/26	ADMINISTRATIVE PROFESSIONAL II
HS - PUBLIC HEALTH		
BETHANY L FOSU	5/18/26	PHYSICIAN BPT
HS - TRANSPORTATION		
MICHAEL J CATTLEY	5/4/26	FLEET SERVICE ASSISTANT PT
STEPHEN K EPSTEIN	5/18/26	TRANSPORTATION DRIVER PT
PARKS AND RECREATION		
DANIELLA G REYES	5/7/26	SR PARK ATTENDANT - SEASONAL
LANDON A BARTLEY	5/16/26	LIFEGUARD - SEASONAL
VALERIE A CISNEROS-ROMAN	5/16/26	HEAD LIFEGUARD - SEASONAL
BRYCE W COOKE	5/16/26	LIFEGUARD - SEASONAL
PLANNING		
KAUNG KHANT NYEIN	5/18/26	PLANNER
PUBLIC LIBRARY		
ELIZABETH M BLAIR	5/4/26	LIBRARY ASSISTANT PT
COURTNEY N GALINKIN	5/4/26	LIBRARY ASSOCIATE PT
REGISTER OF DEEDS		
LAUREN M FUSETTI	5/18/26	DEPUTY I - REGISTER OF DEEDS
SHERIFF/JAIL/FACILITIES		
ADAM R BROCK	5/18/26	DEPUTY SHERIFF
JUSTIN B GODFREY	5/18/26	DEPUTY SHERIFF
STEPHEN D XAVIER	5/18/26	LE INFORMATION SYSTEM COOR
TA - ASSESSMENT		
JACOB B WRIGHT	5/4/26	REAL ESTATE APPRAISER I
LADRICKA N ERVIN	5/18/26	LAND RECORDS TECHNICIAN

UNION COUNTY PERSONNEL REPORT
REPORT OF RETIREES AND SEPARATIONS FROM SERVICE

May 2026

Name	Hire Date	Separation Date	Position
RETIREES			
HS - SOCIAL SERVICES			
KEVIN D ALEXANDER	10/14/19	5/29/26	SENIOR SOCIAL WORKER
SHERIFF/JAIL/FACILITIES			
MARVIN S PRESSLEY	12/14/15	5/31/26	LE INFORMATION SYSTEM COOR
SEPARATION FROM SERVICE			
911 COMMUNICATIONS			
ZACHARIAH P VIETS	7/14/25	5/31/26	TELECOMMUNICATOR I
FACILITIES MANAGEMENT			
ALEXANDER P COLE	9/12/22	5/1/26	ELECTRICIAN
HS - SOCIAL SERVICES			
CYNDY N RODRIGUEZ	5/28/19	5/29/26	SOCIAL WORKER
QUINNEKIA Z COLES	7/5/22	5/8/26	SENIOR SOCIAL WORKER
LAUREN R PROFFITT	11/20/23	5/29/26	ELIGIBILITY SPECIALIST
TY-SHINTA T ADAMS	2/26/24	5/6/26	SENIOR SOCIAL WORKER
RUTH D ALVARADO	12/1/25	5/15/26	ELIGIBILITY SPECIALIST
HS - VETERANS SERVICES			
ALEX O WHITAKER	11/12/19	5/1/26	ADMINISTRATIVE PROFESSIONAL II
PARKS AND RECREATION			
ROBBIE D EASON	7/13/24	5/22/26	MAINTENANCE TECHNICIAN
SEAN A PATTON	8/27/25	5/20/26	PARK RANGER - SEASONAL
PUBLIC LIBRARY			
CAROLYN S EBERLY	9/7/11	5/27/26	LIBRARY SPECIALIST PT
MEDDOWS P CRESWELL	1/27/25	5/24/26	LIBRARY ASSISTANT PT
TAYLOR M SMITH	9/8/25	5/16/26	LIBRARY ASSISTANT PT
SHERIFF/JAIL/FACILITIES			
STACEY M LITTLE	6/3/24	5/14/26	ANIMAL CARE SPECIALIST
UCW - WATER & WASTEWATER OPS			
JORDAN G HELMS	5/11/20	5/1/26	UTILITY TECHNICIAN SUPERVISOR
CODY D GORDON	3/9/26	5/1/26	UTILITY TECHNICIAN I

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Center
500 North Main Street
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File #: 26-410 **Agenda Date:** 7/20/2026

TITLE:

Drought Status - Update

INFORMATION CONTACT:

Aubrey Lofton, Water, Planning & Resource Management Director, 704-296-4241

ACTION REQUESTED:

None

PRIOR BOARD ACTIONS:

None

BACKGROUND:

Union County Water is closely following the current drought. Union County Water declared Stage 2 Drought Restrictions on May 15 to comply with the Catawba-Wateree Drought Management Advisory Group's status change based on the Low Inflow Protocol triggers. Attached are the updated Low Inflow Protocol triggers as of July 1, 2026 and the US Drought Monitor as of July 2, 2026.

FINANCIAL IMPACT:

None

Catawba-Wateree Low Inflow Protocol Trigger Status Summary for 07/01/2026 and Changes Compared to 06/01/2026

	Reservoir Storage as % of Target	% of 6-Month Long-Term Avg Streamflow	3-Month Avg of US Drought Monitor
Normal	>=100%	>85%	<0
LIP Stage 0	>90%	<=85%	>=0
LIP Stage 1	79.5% >75%	<=78%	>=1
LIP Stage 2	>57%	<=65%	2.24 >=2
LIP Stage 3	>42%	<=55%	>=3
LIP Stage 4	<=42%	40.6% <=40%	4

Previous trigger levels at last update (June 1, 2026)

- Reservoir Storage as % of Target – 85.9%
- 6-Month Average Streamflow – 40.9%
- 3-Month Average US Drought Monitor – 2.33

North Carolina Drought Update

Created By:
North Carolina Drought Management Advisory Council
www.ncdrought.org
NORTH CAROLINA CLIMATEOFFICE
climate.ncsu.edu
@NCSCO
NC STATE

For the assessment period ending **June 30, 2026**

*From the US Drought Monitor, with input from the **NC DMAC***

The Main Takeaway

After heavy rains over the past two weeks, eastern NC has seen widespread improvements, including parts of the coastline shifting back to Moderate Drought (D1).

This Week's Summary

While most of the state has seen showers in recent weeks, eastern North Carolina is offering a template for sustained drought recovery, with multiple rounds of rain totaling 3 to 6 inches over the final two weeks of June. That persistent precipitation has replenished the soil moisture all the way down to the groundwater stores.

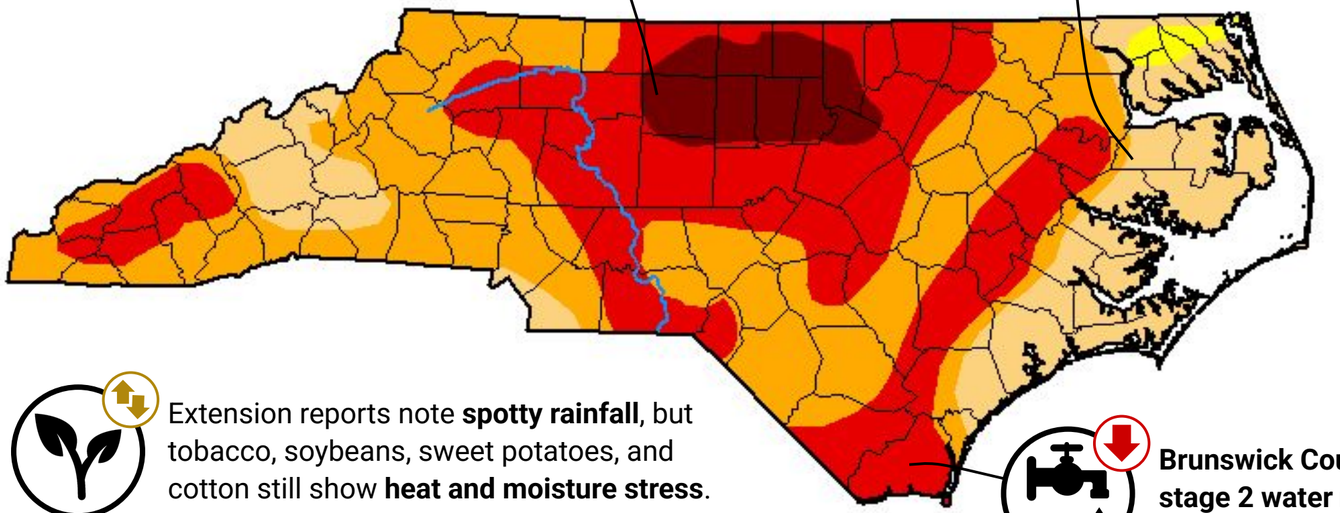
Exceptional Drought Update

Despite some rain over the past two weeks, most of the northern Piedmont remains in D4. In these areas, high evaporation rates in the heat have quickly sapped new moisture, and lake levels haven't bounced back just yet.

For your local drought status, visit **www.ncdrought.org**

Greensboro had 1.91 inches of rain in the past two weeks, but it still **finished June with less than half its normal rainfall**.

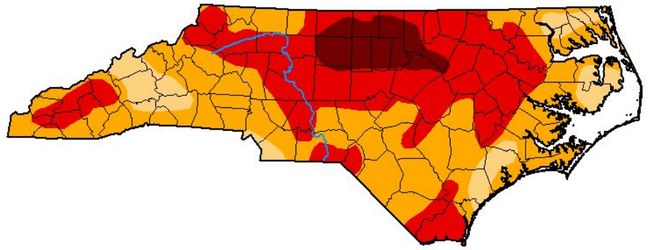
The **Hoke groundwater well is back to near normal levels** after receiving more than five inches of rain in June.



Extension reports note **spotty rainfall**, but tobacco, soybeans, sweet potatoes, and cotton still show **heat and moisture stress**.

Brunswick County has shifted to stage 2 water restrictions, with irrigation limited to 3 days per week.

Last Week's Drought Status



Statewide Coverage by Category

Category	Current Coverage	Change Since Last Week
D0: Abnormally Dry	0.89%	0.89%
D1: Moderate Drought	18.20%	+8.64%
D2: Severe Drought	38.88%	-6.38%
D3: Extreme Drought	35.40%	-2.77%
D4: Exceptional Drought	6.62%	-0.40%

File #: 26-416 **Agenda Date:** 7/20/2026

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 June 2026 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 68.9%
- Percent of Actual + Permitted Flows = 90.1%
- Actual Flows (MGD) = 5.168
- Actual + Permitted Obligated Flows (MGD) = 6.760

Crooked Creek

- Percent of Actual Flows = 64.4%
- Percent of Actual + Permitted Flows = 93.7%
- Actual Flows (MGD) = 1.223
- Actual + Permitted Obligated Flows (MGD) = 1.781

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 = 34.0%

- Percent of Actual + Permitted Flows = 34.0%
- Actual Flows (MGD) = 0.017
- Actual + Permitted Obligated Flows (MGD) = 0.017

Grassy Branch

- Percent of Actual Flows = 72.0%
- Percent of Actual + Permitted Flows = 74.0%
- Actual Flows (MGD) = 0.036
- Actual + Permitted Obligated Flows (MGD) = 0.037

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 June 2026 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	5.168	68.9%	6.760	90.1%	3.2
Crooked Creek	1.9	1.223	64.4%	1.781	93.7%	3.0
Olde Sycamore	0.15	0.039	26.0%	0.039	26.0%	3.4
Tallwood	0.05	0.017	34.0%	0.017	34.0%	3.2
Grassy Branch	0.05	0.036	72.0%	0.037	74.0%	2.9

[1]Based 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	0.037
Engineering Plan Review	14	0.427
Sketch Plan Review	11	0.283
Totals	**28**	**0.747**

Crooked Creek WRF		
Backlog Type	**Number of Projects**	**Requested Flow (MGD)**
Approved – Permit Submittal Pending	3	0.055
Engineering Plan Review	8	0.195
Sketch Plan Review	9	0.156
Totals	**20**	**0.406**

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File #: 26-411 **Agenda Date:** 7/20/2026

TITLE:

Communications Monthly Report - June 2026

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.

UNIONCOUNTY
north carolina



Communications Monthly Report

June 2026





Top Projects

1 FY27 Budget Communications

After the Board of Commissioners adopted the Fiscal Year 2027 budget, Public Communications worked with Budget and Grants Management to share easy-to-understand information about the operating and capital budgets, including highlights such as a flat tax rate and key investments in several areas including public safety, emergency services, education, economic development, and human services.





2 America 250 Art Contest

In partnership with the Union County Community Arts Council, Union County coordinated an America 250 Student Art Contest, inviting kindergarten through 12th grade students to submit original artwork inspired by the theme "America the Beautiful." This campaign included several social posts, a webpage, news story, as well as a reception event. Voting for the contest took place on Engage Union County, with more than 1,170 voters participating.

3 Economic Development Website Launch

After a year of development, Public Communications launched DiscoverUnionCounty.com, a new website for Union County Economic Development. Designed to highlight the County's industry recruitment and retention services, the site features new videos with interviews from nearly 20 community stakeholders. The launch included a press release, website news story, social media posts, and the creation of an email newsletter and LinkedIn presence for the Economic Development team.



139 Projects Completed

28 Departments Supported

Website

Top Search Terms

1. Passport
2. Landfill
3. Permits
4. Burn Ban
5. Careers

Top Webpages

1. GIS & Mapping
2. Cane Creek Park
3. Taxes and Property

Website Visits

unioncountync.gov

395,844

7.9% vs. previous month

Sprout Automated Webchat

Let's Chat

959 Total Communications

Social Media

46,796 Total Followers

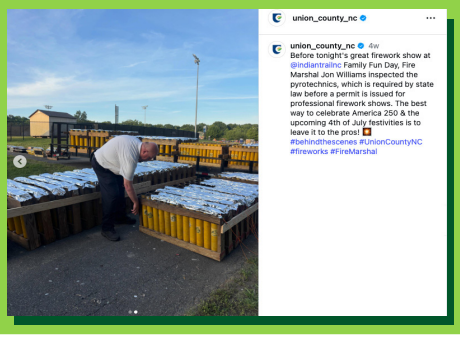
Top Posts



Facebook
New Employees
10.3% Engagement Rate
19,742 Reach



LinkedIn
New Employees
12.3% Engagement Rate
1,517 Impressions



Instagram
Indian Trail Fireworks
9.6% Engagement Rate
1,114 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.

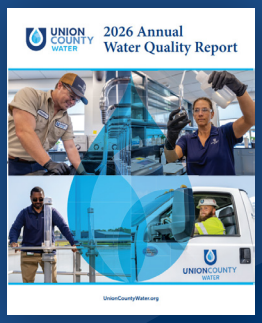
Public Records Requests

93 Received ▶ **75** Completed

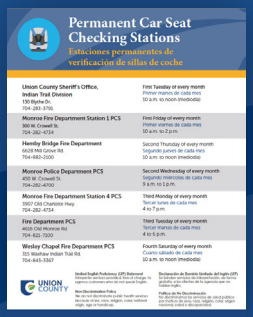
Media Interactions

10

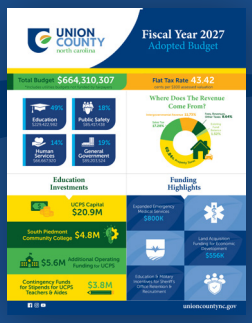
Creative Highlights



Water Quality Report



Car Seat Safety Flyer



FY27 Infographic

Video Engagement



YouTube

BOCC Joint Meeting with UCPS

1,257 Views

525.9 Hours of Watch Time

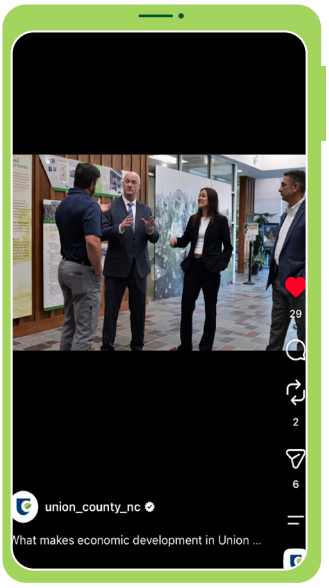


Facebook

Lifesaver Awards

6,126 Views

14,257 Impressions



Instagram

Economic Development in Union County

972 Views

709 Average Reach

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

File #: 26-417 **Agenda Date:** 7/20/2026

TITLE:

South Piedmont Regional Autopsy Center - July 2026 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.

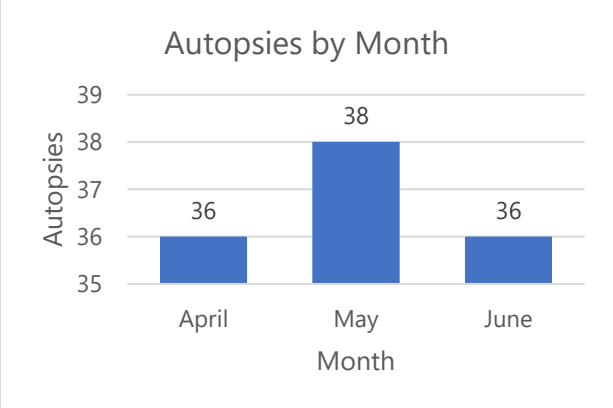
South Piedmont Regional Autopsy Center

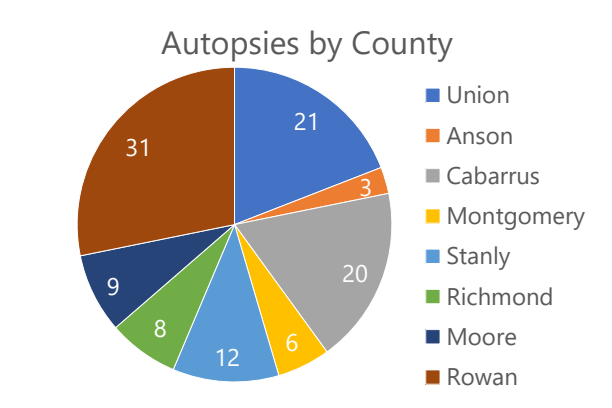
July 2026 Quarterly Report

April 2026-June2026

The South Piedmont Regional Autopsy Center (SPRAC) continues to perform autopsies at its temporary facility located at Atrium Health Union. Service expanded to include Gaston County on July 1, 2026.

Between April 1, 2026, and June 30, 2026, a total of 110 autopsies were performed. Of those, 21 involved deaths in Union County, three in Anson County, 20 in Cabarrus County, six in Montgomery County, 12 in Stanly County, eight in Richmond County, nine in Moore County, and 31 in Rowan County.





From April through June, 17 cases were connected to criminal investigations, with zero death by distribution cases. 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. Groundbreaking is tentatively scheduled for September 2026. The facility is on track for completion in mid-fiscal year 2028.

SPRAC will continue to evaluate trends in autopsy volume to support efficient operations across all counties served. These insights will guide ongoing decision making as the center expands services and advances planning for the permanent facility.

File #: 26-368 **Agenda Date:** 7/20/2026

TITLE:

Rezoning Petition 2026-CZ-005 McAteer

INFORMATION CONTACT:

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

ACTION REQUESTED:

To make a decision on this rezoning petition, the Board of Commissioners can consider the following motions:

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

Motion

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

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

Motion

(i) Deny rezoning petition CZ-2026-005 from Jeremy McAteer; and (ii) adopt the consistency and reasonableness statement for denial

PRIOR BOARD ACTIONS:

June 16, 2026, Regular Meeting, Agenda Item # 26-321 - Public Hearing Held

BACKGROUND:

This case is a request to rezone a 5.75 acre portion of a 17.21 acre parcel appearing on the tax map as tax parcel 09-384-013 located on South Rocky River Road from RA-40 to Light Industrial (LI) with Conditions. The rezoning request is a conditional rezoning, and includes the following conditions:

1) Limited to approved site plan dated April 6, 2026
2) Uses limited to office, warehouse and construction equipment and material storage
3) 5.75 acre portion will be subdivided from parcel
4) Five-year vesting of development rights
5) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval

The Land Use Board unanimously recommended approval at its May 19, 2026 meeting, citing consistency with the Land Use Map and increased business opportunities.

A public hearing was conducted on June 16. No one spoke for or against the rezoning.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

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

General Information

Project Address 0 South Rocky River Rd City Monroe State North Carolina Zip 28112

Tax Parcel ID 09384013 Current Zoning Designation RA-40 Total Acres 17.21 (will be subdividing and rezoning 5.75 ac)

Proposed Zoning Designation Light Industrial Date Submitted 3/3/2026

Contact Information

Applicant Name Jeremy McAteer

Address 1115 McAteer Rd City Monroe State North Carolina Zip 28112

Phone 704-282-0788 Fax _____ Email _____

Property Owner Name MCATEER JEREMY D TRUSTEE ET AL MCATEER AMBER L TRUSTEE

Address 1115 McAteer Rd City Monroe State North Carolina Zip 28112

Phone 704-282-0788 Fax _____ Email _____

Applicant's Certification

Signature | 3/3/26 Date | Jeremy McAteer Printed Name/Title

Owner's Certification (include names and signatures of all owners)

Signature | 3/3/26 Date | Jeremy McAteer Printed Name/Title
Amber McAteer

Union County Office Use Only:

Case Number: 2026-CZ-005 Date Received: 3-3-26

Amount of Fee: $1000 Fee Ok: BCH Received by: BCH

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

UNIONCOUNTY north carolina

**This document is only valid from July 1, 2025 - June 30, 2026

Union County Planning & Zoning Department
Union County Government Center
500 North Main Street
Monroe, NC 28112

Re: **Letter of Intent – Rezoning Application**
Parcel ID #09384013 – S Rocky River Road
Monroe, North Carolina

Dear Planning Staff and Members of the Review Committee:

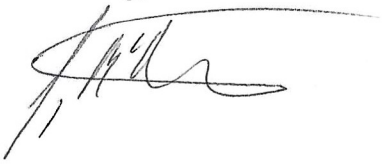
On behalf of McAteer Design, Inc., I am submitting this Letter of Intent in support of our application to rezone **Parcel ID #09384013**, located on S Rocky River Road in Union County, North Carolina.

Our company is currently operating from 3209 Westwood Industrial Drive in Monroe. Due to continued growth and expansion of our operations, our existing facility no longer provides adequate space to effectively support our team and clients.

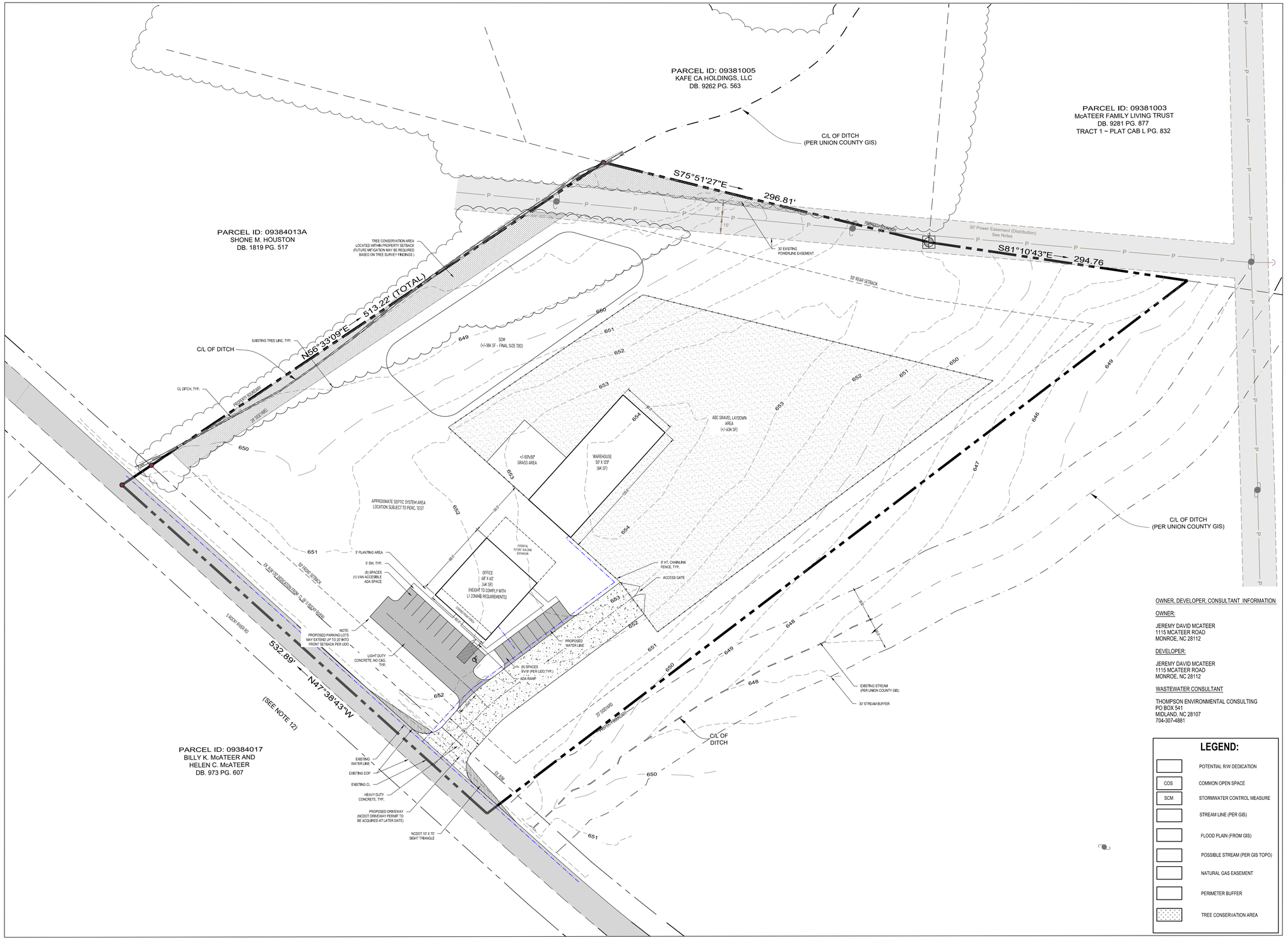
This relocation will allow McAteer Design to operate more efficiently, enhance safety, reduce congestion at our current site, and position the company for sustainable long-term growth within Union County.

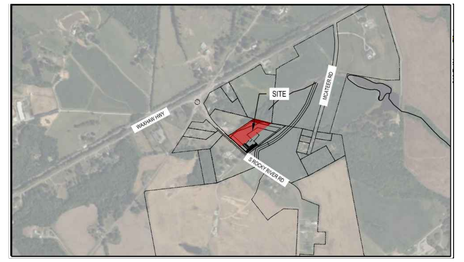
Should you require any additional information or clarification, please do not hesitate to contact me directly.

Sincerely,



Jeremy McAteer
President
McAteer Design, Inc.
704-282-0788
Jeremy.McAteer@McAteerDesign.com





VICINITY MAP

NTS

DEVELOPMENT SUMMARY

TAX PARCELS:	09384013 - UNION COUNTY	
	TOTAL PID ACREAGE:	+\-17.21 AC. (PER GIS)
	TO BE SUBDIVIDED & DEVELOPED:	+\-6.75 AC.
	REMAINING AC. TO BE EXCLUDED:	+\-11.46 AC.
LOCATION:	UNION COUNTY	
ZONING:		
EXISTING:	RA-40 (RESIDENTIAL - AGRICULTURAL)	
PROPOSED:	LI (LIGHT INDUSTRIAL) REZONING REQUIRED	
PROPOSED USE:	OFFICE, GARAGE, LAYDOWN YARD	
MIN. LOT SIZE LI: PROPOSED LOT SIZE:	NO MIN. +\-5.75 AC.	
MAX. IMPERVIOUS AREA (WHEN NO C&G PROPOSED):	36%	
PROPOSED IMPERVIOUS AREA:	36%	
FRONT SETBACK:	50'	
REAR SETBACK:	50'	
SIDEYARD:	20'	
MAX. BLDG HEIGHT:	100'	
PARKING REQUIRED:	0.5 SPACES PER EMPLOYEE 15 EMPLOYEES ANTICIPATED = 7.5 SPACES REQUIRED 0 LOADING SPACES REQUIRED (0-15k SF GROSS FLOOR AREA)	
PARKING PROPOSED:	16 SPACES - 9' X 18' 1 VAN ACCESSIBLE ADA SPACE	
TREE SAVE:	TREE INVENTORY SURVEY REQUIRED IN AREAS "OUTSIDE THE BUILDABLE AREA OF A LOT OR DEVELOPMENT SITE". BUILDABLE AREA = ALL AREAS LOCATED OUTSIDE SETBACKS, R/W'S, EASEMENTS. IE. - TREE SURVEY REQUIRED WITHIN PROPERTY SETBACK AREAS TREES DBH OF 12" OR GREATER MUST BE MITIGATED AT 125% OD DBH REMOVED	
OPEN SPACE:	NOT REQUIRED FOR LI	
WATERSHED:	UPPER RICHARDSON CREEK (PROJECT IS LOCATED IN A WATER SUPPLY WATERSHED)	
TOTAL SF ALL STRUCTURES:	+\- 10K SF	
TOTAL ACREAGE IN R/W: TOTAL DISTURBED AREA:	+\- 0.019 AC. (DRIVEWAY CONNECTION TO S ROCKY RIVER RD) +\- 2.72 AC. (+\- 47% OF TOTAL SITE)	
WATER SOURCE:	S ROCKY RIVER RD PUBLIC WATER LINE (TAP TO BE PROPOSED)	
WASTEWATER SOURCE PROVIDER:	SEPTIC SYSTEM TO BE PROVIDED (SEE OWNER, DEVELOPER, CONSULTANT INFO)	

NOTES

GENERAL NOTES

1. ALL SITE PLAN, ZONING, AND EXISTING CONDITION INFORMATION UTILIZED IN THE PREPARATION OF THIS PLAN IS CONSIDERED TO BE PRELIMINARY IN NATURE AND SUBJECT TO CHANGE AND FINAL VERIFICATION.
2. THIS DOCUMENT IS CONCEPTUAL IN NATURE. DO NOT RELY ON THIS FOR PERMITTING, CONSTRUCTION, BIDDING, ETC.
3. BASE MAP INFORMATION IS DESKTOP GIS DATA AND HAS NOT BEEN FIELD VERIFIED.
4. THE EXISTING TREE LINE AREAS HAVE SIGNIFICANT TOPOGRAPHIC DECLINE AND THE AREAS NEED TO BE FIELD ASSESSED TO DETERMINE IF STREAMS OR WETLANDS ARE PRESENT. DUE TO THIS UNKNOWN, BUFFERS ARE NOT ACCOUNTED AS PART OF THIS CONCEPT PLAN

OPEN SPACE/TREE SAVE

THE OPEN SPACE AND TREE SAVE AREAS SHOWN ON THIS PLAN ARE CONCEPTUAL AND PRELIMINARY. THEIR EXACT LOCATIONS ARE SUBJECT TO CHANGE AS THE CLIENT FINALIZES THE OVERALL SITE LAYOUT, PRODUCT ALLOCATION, AND OTHER SPATIALLY DEPENDENT PROJECT COMPONENTS.

STREAM/WETLAND INFORMATION

THE STREAM AND WETLAND DATA SHOWN ON THIS PRELIMINARY CONCEPT PLAN ARE BASED ON IREDELL COUNTY GIS INFORMATION AND HAVE NOT BEEN FIELD VERIFIED FOR ACCURACY. ALL POTENTIAL WETLAND AREAS AND STREAM FEATURES DEPICTED ARE APPROXIMATE IN LOCATION AND PRELIMINARY IN NATURE.

THIS CONCEPT PLAN IS SUBJECT TO REVISION UPON COMPLETION OF DETAILED FIELD SURVEYS AND VERIFICATION OF JURISDICTIONAL BOUNDARIES BY THE APPROPRIATE REGULATORY AGENCIES. FINAL DELINEATION MAY RESULT IN CHANGES TO THE SITE LAYOUT, AND POTENTIAL UNIT LOSS MAY OCCUR AS A RESULT OF THESE ADJUSTMENTS.

FLOODPLAIN INFORMATION

FLOOD PLAIN INFORMATION OBTAINED FROM FEMA FIRM PANEL 3710466600J EFFECTIVE DATE OF 03/18/2008. NO FLOODPLAIN LOCATED ON THE PROPERTY

STORMWATER CONTROL MEASURES

THE LOCATION AND SIZE OF PROPOSED STORMWATER CONTROL MEASURES ARE CONCEPTUAL AND PRELIMINARY. FINAL STORMWATER DESIGN WILL BE DETERMINED AS THE OVERALL PROJECT LAYOUT, PRODUCT ALLOCATION, AND OTHER KEY PROJECT ELEMENTS ARE REFINED. THESE AREAS ARE SUBJECT TO CHANGE BASED ON FINAL ENGINEERING, AND AS SUCH, THE SITE LAYOUT AND TOTAL UNIT COUNT MAY ALSO BE ADJUSTED TO ACCOMMODATE STORMWATER REQUIREMENTS.

ACCESS POINTS/DRIVEWAYS/STREETS

1. PROPOSED SITE ENTRANCE LOCATIONS ARE PRELIMINARY AND MUST BE EVALUATED TO CONFIRM ADEQUATE SIGHT DISTANCE.
2. ALL INTERNAL ROADWAY AND STREET SYSTEMS SHOWN ARE CONCEPTUAL AND SUBJECT TO CHANGE. FINAL DESIGN MUST BE REVIEWED AND VERIFIED FOR COMPLIANCE WITH THE TOWN OF MOORESVILLE UNIFIED DEVELOPMENT ORDINANCE (UDO) AND APPLICABLE NCDOT STANDARDS.
3. PROPOSED STREET CONNECTIONS ARE ALIGNED WITH EXISTING ROADS BUT ARE CONCEPTUAL AND MAY BE ADJUSTED BASED ON FEEDBACK AND REQUIREMENTS FROM REVIEWING AGENCIES.

DISCLAIMER ON SOURCE DATA ACCURACY:

P3 CIVIL EXPRESSLY DISCLAIMS ANY LIABILITY FOR PLAN DEFICIENCIES OR ERRORS ARISING FROM RELIANCE ON INCORRECT, INCOMPLETE, MISSING, OR OUTDATED INFORMATION OBTAINED FROM PUBLIC SOURCES, INCLUDING BUT NOT LIMITED TO GIS DATA, PLANNING, OR ZONING DEPARTMENTS. THE CLIENT ACKNOWLEDGES AND AGREES THAT VERIFICATION OF ALL SUCH DATA IS THEIR SOLE RESPONSIBILITY, AND P3 CIVIL SHALL NOT BE HELD RESPONSIBLE FOR ANY DAMAGES, LOSSES, OR COSTS RESULTING FROM INACCURACIES IN THIRD-PARTY SOURCE INFORMATION.

UNION COUNTY NOTES

THOUGH IT MAY NOT BE ILLUSTRATED, SHOWN, LISTED, DENOTED, OR EXPRESSED THIS PLAN SHALL COMPLY WITH ALL PROVISIONS OF THE UNION COUNTY LAND DEVELOPMENT ORDINANCE IN EFFECT AT TIME OF REVIEW AND APPROVAL

PARKING LOT SURFACE SHALL BE MAINTAINED IN SUCH A MANNER TO PREVENT, REPAIR, OR REPLACE DETERIORATED SURFACE MATERIAL, POTHOLES AND MAJOR CRACKING OF IMPERVIOUS/PERVIOUS SURFACE MATERIAL AND STRIPING SHALL BE VISIBLE AND WELL DEFINED.

FOR PRESERVED VEGETATION, MAINTENANCE SHALL BEGIN AT THE TIME THAT THE ROOT PROTECTION ZONES ARE ESTABLISHED (PRIOR TO ROUGH GRADING) AND SHALL CONTINUE INDEFINITELY, FOR PLANTED MATERIALS, MAINTENANCE SHALL BEGIN AT THE TIME OF PLANTING AND SHALL CONTINUE INDEFINITELY.

NO OUTDOOR LIGHTING PROPOSED.

OWNER, DEVELOPER, CONSULTANT INFORMATION

OWNER:

JEREMY DAVID MCATEER
1115 MCATEER ROAD
MONROE, NC 28112

DEVELOPER:

JEREMY DAVID MCATEER
1115 MCATEER ROAD
MONROE, NC 28112

WASTEWATER CONSULTANT

THOMPSON ENVIRONMENTAL CONSULTING
PO BOX 541
MIDLAND, NC 28107
704-307-4881

LEGEND:

- POTENTIAL R/W DEDICATION
- COS — COMMON OPEN SPACE
- SCM — STORMWATER CONTROL MEASURE
- STREAM LINE (PER GIS)
- FLOOD PLAIN (FROM GIS)
- POSSIBLE STREAM (PER GIS TOPO)
- NATURAL GAS EASEMENT
- PERIMETER BUFFER
- TREE CONSERVATION AREA

P3 CIVIL. PLLC

750 Imperial Ct
Charlotte, NC 28273
www.p3-civil.com

MCATEER DESIGN OFFICE

CONCEPT PLAN

P3 JOB # 2025-0018
APRIL 6, 2026

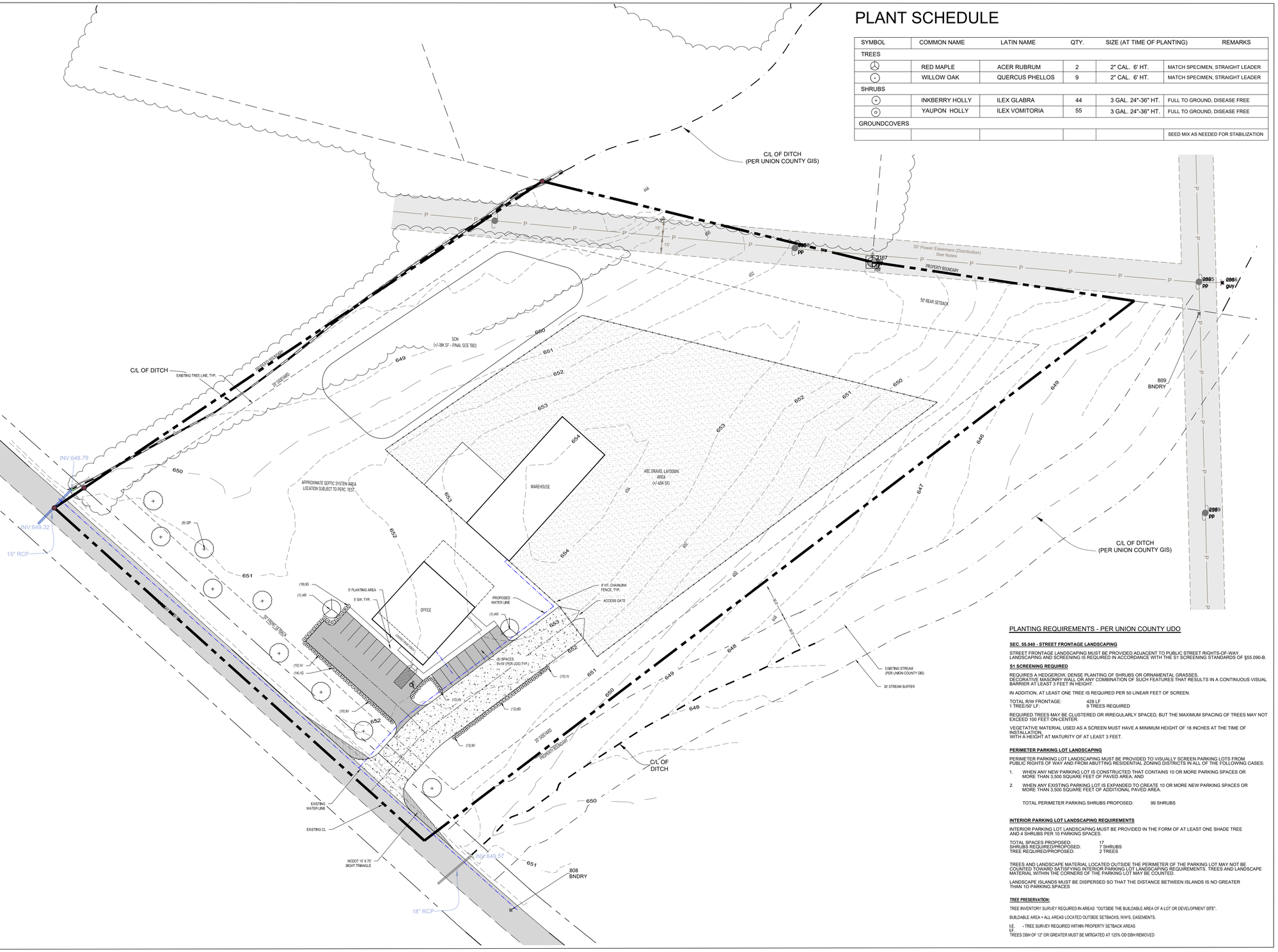
GRAPHIC SCALE

−40 0 40 80

SCALE: 1" = 40'

PLANT SCHEDULE

SYMBOL	COMMON NAME	LATIN NAME	QTY.	SIZE (AT TIME OF PLANTING)	REMARKS
TREES					
	RED MAPLE	ACER RUBRUM	2	2" CAL. 6' HT.	MATCH SPECIMEN, STRAIGHT LEADER
	WILLOW OAK	QUERCUS PHELLOS	9	2" CAL. 6' HT.	MATCH SPECIMEN, STRAIGHT LEADER
SHRUBS					
	INKBERRY HOLLY	ILEX GLABRA	44	3 GAL. 24"-36" HT.	FULL TO GROUND, DISEASE FREE
	YAUPON HOLLY	ILEX VOMITORIA	55	3 GAL. 24"-36" HT.	FULL TO GROUND, DISEASE FREE
GROUNDCOVERS					
					SEED MIX AS NEEDED FOR STABILIZATION



PLANTING REQUIREMENTS - PER UNION COUNTY UDO

SEC. 55.040 - STREET FRONTAGE LANDSCAPING

STREET FRONTAGE LANDSCAPING MUST BE PROVIDED ADJACENT TO PUBLIC STREET RIGHTS-OF-WAY. LANDSCAPING AND SCREENING IS REQUIRED IN ACCORDANCE WITH THE S1 SCREENING STANDARDS OF §55.090-B.

S1 SCREENING REQUIRED

REQUIRES A HEDGEROW, DENSE PLANTING OF SHRUBS OR ORNAMENTAL GRASSES, DECORATIVE MASONRY WALL OR ANY COMBINATION OF SUCH FEATURES THAT RESULTS IN A CONTINUOUS VISUAL BARRIER AT LEAST 3 FEET IN HEIGHT.

IN ADDITION, AT LEAST ONE TREE IS REQUIRED PER 50 LINEAR FEET OF SCREEN.

TOTAL R/W FRONTAGE:	428 LF
1 TREE/50' LF:	9 TREES REQUIRED

REQUIRED TREES MAY BE CLUSTERED OR IRREGULARLY SPACED, BUT THE MAXIMUM SPACING OF TREES MAY NOT EXCEED 100 FEET ON-CENTER.

VEGETATIVE MATERIAL USED AS A SCREEN MUST HAVE A MINIMUM HEIGHT OF 18 INCHES AT THE TIME OF INSTALLATION;
WITH A HEIGHT AT MATURITY OF AT LEAST 3 FEET.

PERIMETER PARKING LOT LANDSCAPING

PERIMETER PARKING LOT LANDSCAPING MUST BE PROVIDED TO VISUALLY SCREEN PARKING LOTS FROM PUBLIC RIGHTS OF WAY AND FROM ABUTTING RESIDENTIAL ZONING DISTRICTS IN ALL OF THE FOLLOWING CASES:

1. WHEN ANY NEW PARKING LOT IS CONSTRUCTED THAT CONTAINS 10 OR MORE PARKING SPACES OR MORE THAN 3,500 SQUARE FEET OF PAVED AREA; AND
2. WHEN ANY EXISTING PARKING LOT IS EXPANDED TO CREATE 10 OR MORE NEW PARKING SPACES OR MORE THAN 3,500 SQUARE FEET OF ADDITIONAL PAVED AREA.

TOTAL PERIMETER PARKING SHRUBS PROPOSED: 99 SHRUBS

INTERIOR PARKING LOT LANDSCAPING REQUIREMENTS

INTERIOR PARKING LOT LANDSCAPING MUST BE PROVIDED IN THE FORM OF AT LEAST ONE SHADE TREE AND 4 SHRUBS PER 10 PARKING SPACES.

TOTAL SPACES PROPOSED:	17
SHRUBS REQUIRED/PROPOSED:	7 SHRUBS
TREE REQUIRED/PROPOSED:	2 TREES

TREES AND LANDSCAPE MATERIAL LOCATED OUTSIDE THE PERIMETER OF THE PARKING LOT MAY NOT BE COUNTED TOWARD SATISFYING INTERIOR PARKING LOT LANDSCAPING REQUIREMENTS. TREES AND LANDSCAPE MATERIAL WITHIN THE CORNERS OF THE PARKING LOT MAY BE COUNTED.

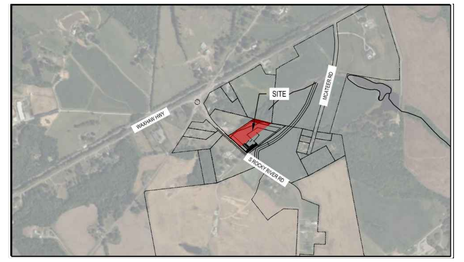
LANDSCAPE ISLANDS MUST BE DISPERSED SO THAT THE DISTANCE BETWEEN ISLANDS IS NO GREATER THAN 1O PARKING SPACES

TREE PRESERVATION:

TREE INVENTORY SURVEY REQUIRED IN AREAS "OUTSIDE THE BUILDABLE AREA OF A LOT OR DEVELOPMENT SITE".

BUILDABLE AREA = ALL AREAS LOCATED OUTSIDE SETBACKS, R/W'S, EASEMENTS.

I.E. - TREE SURVEY REQUIRED WITHIN PROPERTY SETBACK AREAS
I.E.
TREES DBH OF 12" OR GREATER MUST BE MITIGATED AT 125% OD DBH REMOVED



VICINITY MAP

NTS

TREE, SHRUB, AND GROUNDCOVER PLANTING – GENERAL NOTES

(UNION COUNTY, NC – PLAN SHEET STANDARD)

ALL PLANT MATERIAL SHALL CONFORM TO THE LATEST EDITION OF THE AMERICAN STANDARD FOR NURSERY STOCK (ANSI Z60.1) AND SHALL BE NURSERY-GROWN, HEALTHY, AND TRUE TO NAME.

ALL TREES, SHRUBS, AND GROUNDCOVERS SHALL BE INSTALLED IN ACCORDANCE WITH
GASTON COUNTY UDO, ALL APPLICABLE LANDSCAPE REQUIREMENTS, AND THESE PLANS.

PLANT SUBSTITUTIONS ARE NOT ALLOWED WITHOUT WRITTEN APPROVAL FROM THE LANDSCAPE ARCHITECT, ENGINEER, OR THE AUTHORITY HAVING JURISDICTION.

ALL PLANTING AREAS SHALL BE FREE OF CONSTRUCTION DEBRIS, ROCKS, AND SPOIL MATERIAL.
SOILS SHALL BE LOOSENED AND DE-COMPACTED TO A MINIMUM DEPTH OF 6–8 INCHES PRIOR TO PLANTING.

ALL TREES SHALL BE INSTALLED WITH THE ROOT FLARE AT OR NO MORE THAN 1" ABOVE FINISHED GRADE. REMOVE ALL BURLAP, TWINE, AND WIRE FROM THE TOP 1/3 OF THE ROOT BALL.

SHRUBS AND GROUNDCOVERS SHALL BE INSTALLED SO THAT THE ROOT CROWN IS LEVEL WITH ADJACENT GRADE. PLANTS SHALL NOT BE INSTALLED DEEPER THAN THEIR ORIGINAL CONTAINER DEPTH.

MULCH ALL TREE SAUCERS, SHRUB BEDS, AND GROUNDCOVER AREAS TO A 3-INCH DEPTH
(2 INCHES IN GROUND-COVER AREAS). MULCH SHALL BE SHREDDED HARDWOOD OR PINE BARK AND SHALL BE CLEAN, WEED-FREE, AND FREE OF INVASIVE SPECIES.

TREES SHALL BE STAKED ONLY IF REQUIRED BY THESE PLANS OR THE SITE CONDITIONS. REMOVE STAKES AND STRAPS AFTER 12 MONTHS.

CONTRACTOR SHALL WATER ALL PLANTS IMMEDIATELY AFTER INSTALLATION AND SHALL MAINTAIN ADEQUATE MOISTURE UNTIL FINAL ACCEPTANCE. ALL PLANTING SHALL OCCUR ONLY WHEN SOIL CONDITIONS ARE SUITABLE.

ANY PLANT MATERIAL THAT DIES, DECLINES, OR FAILS TO THRIVE SHALL BE REPLACED BY THE CONTRACTOR AT NO COST TO THE OWNER PRIOR TO FINAL ACCEPTANCE.

A MINIMUM ONE-YEAR WARRANTY SHALL APPLY TO ALL TREES, SHRUBS, AND GROUNDCOVERS FROM THE DATE OF FINAL INSTALLATION.

CONTRACTOR SHALL VERIFY ALL UTILITY LOCATIONS PRIOR TO EXCAVATION (CALL 811). PLANTING HOLES SHALL NOT BE EXCAVATED WITHIN DESIGNATED UTILITY EASEMENTS WITHOUT PRIOR APPROVAL.

ALL PLANTING BEDS SHALL RECEIVE A WEED-FREE, 3-INCH SOIL AMENDMENT INCORPORATION WHERE SHOWN OR REQUIRED TO IMPROVE SOIL STRUCTURE AND DRAINAGE.

CONTRACTOR SHALL PROTECT EXISTING TREES AND SITE FEATURES DURING CONSTRUCTION. ANY DAMAGE SHALL BE REPAIRED OR REPLACED AT THE CONTRACTOR'S EXPENSE.

FINAL PLANTING LOCATIONS MAY BE ADJUSTED UP TO 24 INCHES TO AVOID OBSTRUCTIONS, MAINTAIN PROPER SPACING, AND IMPROVE VISUAL ALIGNMENT, SUBJECT TO APPROVAL.

ALL TREES ADJACENT TO STREETS SHALL BE PLANTED OUTSIDE OF SIGHT TRIANGLES AND SHALL MEET GASTON COUNTY SIGHT DISTANCE REQUIREMENTS.

TURF AREAS ADJACENT TO PLANTING BEDS SHALL BE SMOOTHLY TRANSITIONED TO MATCH EXISTING GRADE AND SHALL DRAIN FREELY AWAY FROM STRUCTURES.

ALL PLANTING WORK SHALL BE PERFORMED BY QUALIFIED PERSONNEL EXPERIENCED IN LANDSCAPE INSTALLATION.

UTILITY-RELATED REQUIREMENTS

CONTRACTOR SHALL CONTACT NORTH CAROLINA 811 PRIOR TO ANY EXCAVATION. ALL UTILITIES SHALL BE FIELD-LOCATED AND MARKED BEFORE ANY PLANTING HOLES ARE DUG.

CONTRACTOR SHALL HAND-DIG ALL PLANTING HOLES WITHIN 5 FEET OF ANY MARKED UNDERGROUND UTILITY. AUGERING IS NOT PERMITTED NEAR UTILITIES.

NO TREE SHALL BE PLANTED WITHIN 10 FEET OF ANY UNDERGROUND UTILITY LINE (WATER, SEWER, ELECTRIC, GAS, FIBER, OR COMMUNICATION) UNLESS APPROVED BY THE ENGINEER AND UTILITY OWNER.

NO TREE SHALL BE PLANTED DIRECTLY ABOVE WATER OR SEWER SERVICE LATERALS. SHRUBS AND GROUNDCOVERS MAY BE USED ONLY IF ROOT SYSTEMS ARE NON-INVASIVE.

NO PLANT MATERIAL SHALL BE INSTALLED WITHIN UTILITY EASEMENTS WITHOUT PRIOR WRITTEN APPROVAL OF THE UTILITY OWNER AND AUTHORITY HAVING JURISDICTION. WHERE PLANTED IN APPROVED EASEMENTS, THE OWNER ACCEPTS RISK OF DAMAGE OR REMOVAL DURING FUTURE UTILITY WORK.

MAINTAIN REQUIRED CLEARANCES FROM OVERHEAD UTILITIES. UNDER POWER LINES, SELECT ONLY TREE SPECIES THAT MATURE BELOW THE UTILITY HEIGHT AS APPROVED BY THE LOCAL ELECTRIC UTILITY.

CONTRACTOR SHALL NOTIFY THE ENGINEER IMMEDIATELY IF A CONFLICT BETWEEN PLANT MATERIAL AND UTILITIES IS DISCOVERED SO THAT FIELD ADJUSTMENTS CAN BE MADE.

SITE & INSTALLATION REQUIREMENTS

FINAL PLANT LOCATIONS MAY BE SHIFTED UP TO 24 INCHES TO AVOID OBSTRUCTIONS, UTILITIES, OR CONFLICTS WHILE MAINTAINING THE INTENT OF THE DESIGN.

MAINTAIN ALL REQUIRED SIGHT TRIANGLE CLEARANCES. NO SHRUBS EXCEEDING 30" MATURE HEIGHT SHALL BE INSTALLED WITHIN SIGHT TRIANGLES.

CONTRACTOR SHALL PROTECT EXISTING TREES, ROOT ZONES, AND SITE FEATURES FROM DAMAGE THROUGHOUT CONSTRUCTION. ANY DAMAGE SHALL BE REPAIRED AT THE CONTRACTOR'S EXPENSE.

TURF AREAS ADJACENT TO PLANTING BEDS SHALL BE GRADED TO PROVIDE SMOOTH TRANSITIONS AND POSITIVE DRAINAGE AWAY FROM STRUCTURES.

ALL WORK SHALL BE PERFORMED BY QUALIFIED LANDSCAPE INSTALLATION PERSONNEL.

P3 CIVIL. PLLC
750 Imperial Ct
Charlotte, NC 28273
www.p3-civil.com

MCATEER DESIGN OFFICE

LANDSCAPE PLAN

P3 JOB # 2025-0018
DECEMBER 15, 2025

GRAPHIC SCALE

−40 0 40 80

SCALE: 1" = 40'

Rezoning Request CZ-2026-005 McAteer

This case is a request to rezone a 5.75 acre portion of a 17.21 acre parcel appearing on the tax map as tax parcel 09-384-013 located on South Rocky River Road from RA-40 to Light Industrial (LI) with Conditions. The rezoning request is a conditional rezoning, and includes the following conditions:

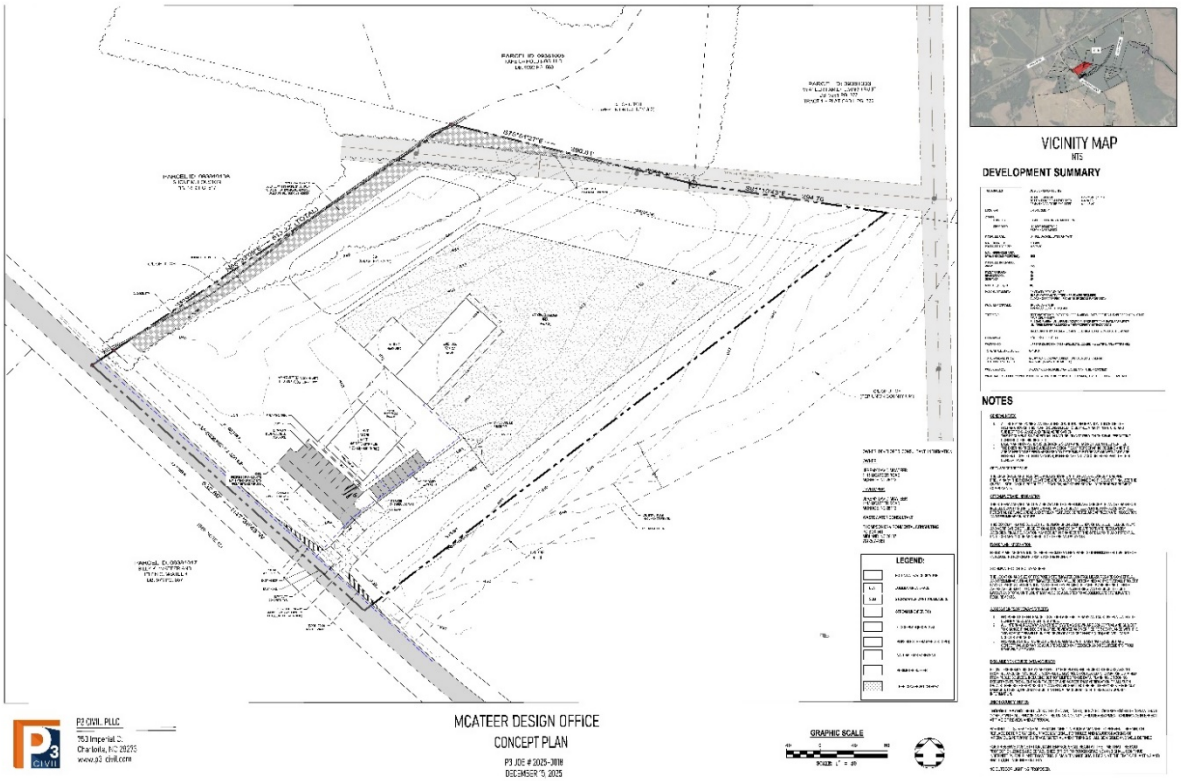
1) Limited to approved site plan dated April 6, 2026

2) Uses limited to office, warehouse and construction equipment and material storage

3) 5.75 acre portion will be subdivided from parcel

4) Five-year vesting of development rights

5) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval



Planning Department
500 North Main Street, Suite 70
Monroe, NC 28112
T 704.283.3565
unioncountync.gov

Contact Information

1. Staff: Bjorn Hansen, Senior Planner, 704-283-3690, bjorn.hansen@unioncountync.gov
2. Owner: McAteer Family Living Trust, 1115 McAteer Road, Monroe, NC 28112
3. Applicant: Jeremy McAteer, 1115 McAteer Road, Monroe, NC 28112

Property Information

Located on the east side of South Rocky River Road south of NC 75. Location more specifically described as tax parcel 09-384-013.



Site



North of Site



West of Site



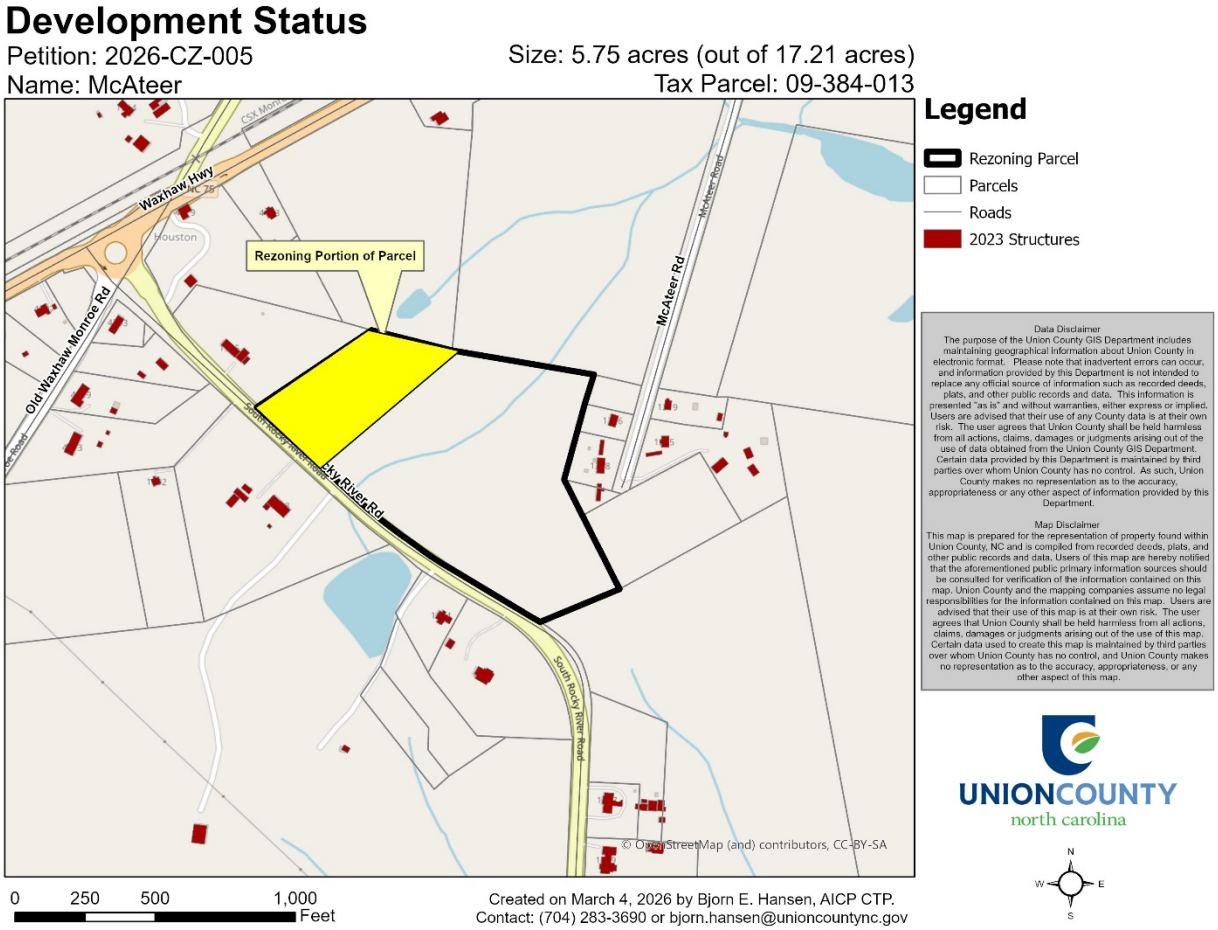
East of Site

Municipal Proximity

The site is one mile east of Mineral Springs.

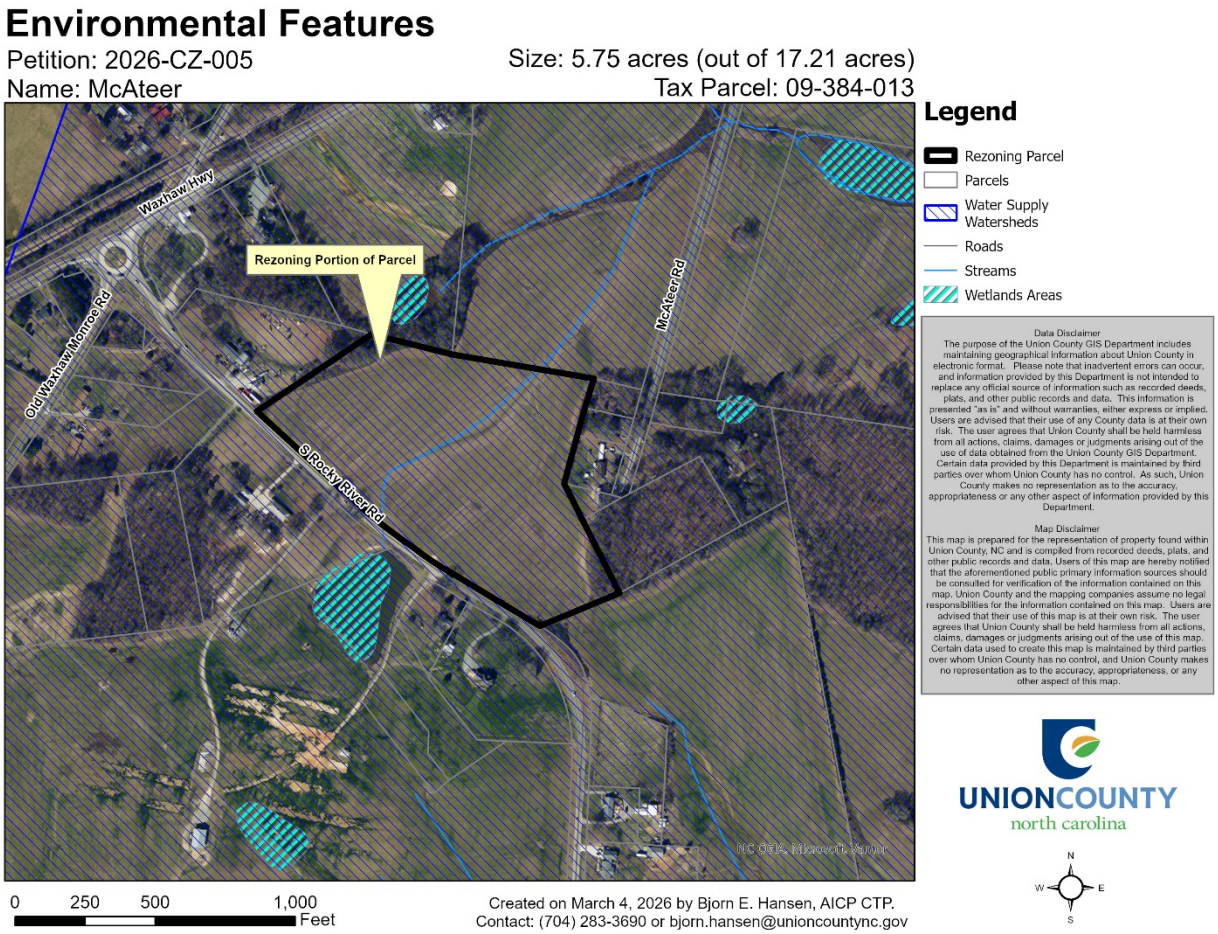
Existing Land Use and Development Status

The parcel is currently zoned RA-40 and is used for row crops.



Environmental Features

There is a stream in the center of the parcel, but it does not impact the portion being rezoned. The entire parcel is within the Lake Lee Water Supply Watershed, which limits impervious surface. The proposed site plan meets the watershed development standards.

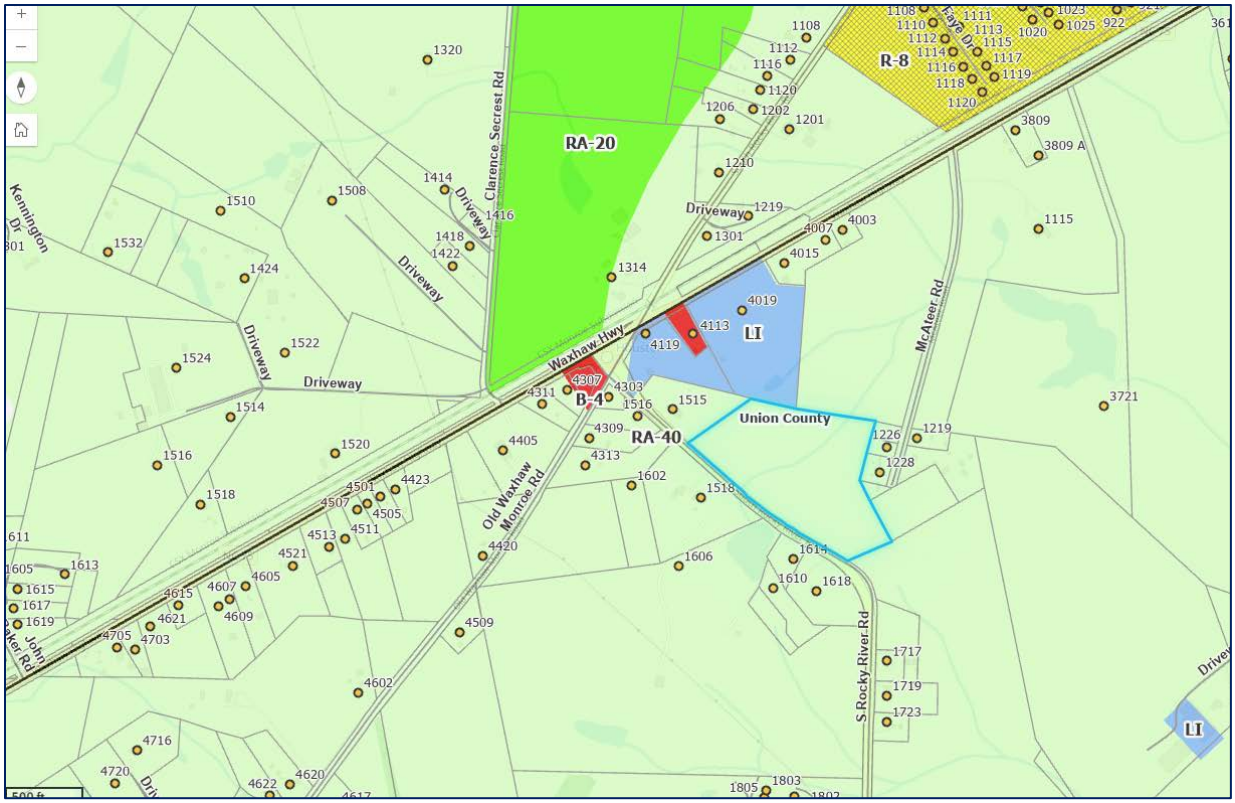


Utilities

Water is available to the site and will rely on septic for sewer service.

Zoning and Land Use History

This property has been zoned RA-40 since zoning was instituted in Union County. There have been several rezonings to Light Industrial immediately north of this property since 1977. Two large residential rezonings south of the site were proposed in 2019 and 2022 and were denied. Two special use permits for day care facilities west of the site were approved in 1981 and 1996. There have been no other zoning actions in the immediate vicinity in unincorporated Union County.



Schools

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

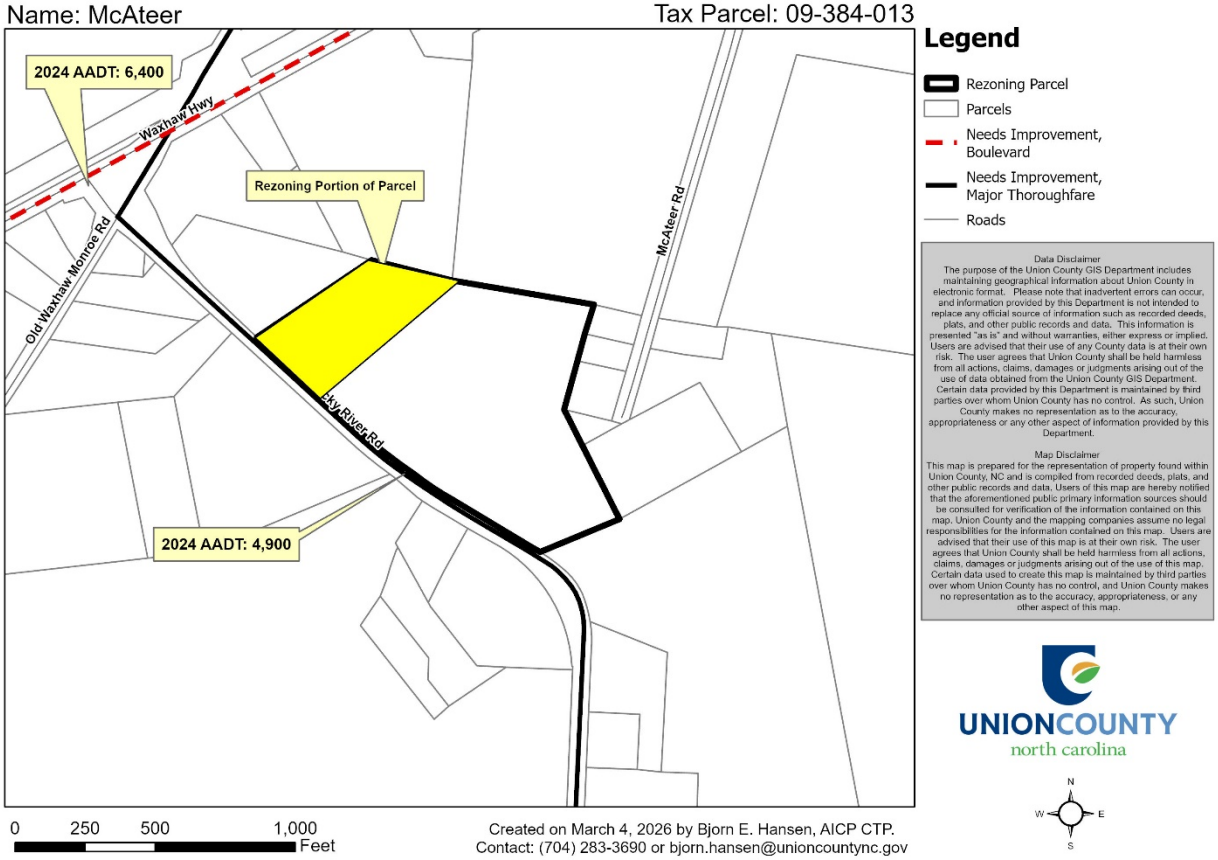
Transportation

This site is on South Rocky River Road, which is a NCDOT-maintained facility. This section of South Rocky River Road carries approximately 4,900 vehicles per day. There are no funded road improvement projects in the immediate vicinity of the rezoning. A traffic Impact Analysis (TIA) was not required for this rezoning. The anticipated trip generation for this site is expected to be low, although it will have a high percentage of truck traffic.

Transportation

Petition: 2026-CZ-005
Name: McAteer

Size: 5.75 acres (out of 17.21 acres)
Tax Parcel: 09-384-013



Created on March 4, 2026 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov

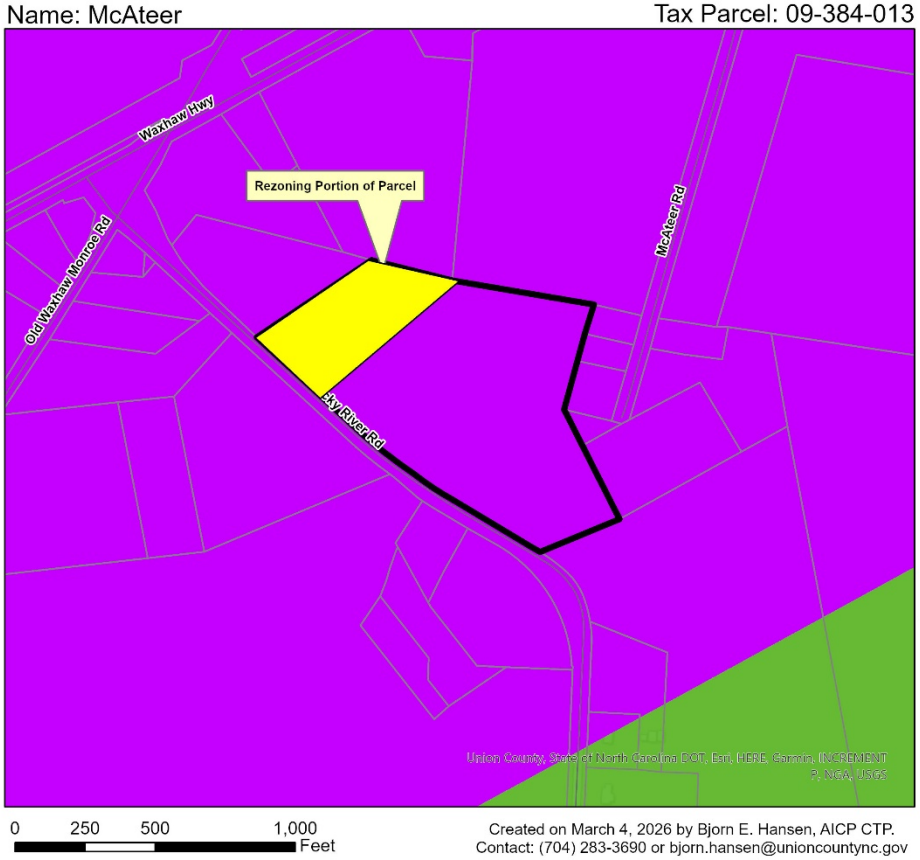
Union County Comprehensive Plan

The Union County 2050 comprehensive plan identifies this area as a Rural Residential area with an Employment Corridor overlay. The uses proposed under Light Industrial zoning are consistent with the intent of the Employment Corridor.

Land Use Map

Petition: 2026-CZ-005
Name: McAteer

Size: 5.75 acres (out of 17.21 acres)
Tax Parcel: 09-384-013



0 250 500 1,000 Feet

Created on March 4, 2026 by Bjorn E. Hansen, AICP CTP.
Contact: (704) 283-3690 or bjorn.hansen@unioncountync.gov

Legend

- Rezoning Parcel
- Parcels
- Roads
- Employment Corridor
- Single Family
- Rural Residential

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

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

UNIONCOUNTY
north carolina

N W E S

Public and Municipal Comments

Public Comments

A community meeting was required and was held on April 28, 2026. A total of two residents attended the meeting and asked questions about parcels impacted by the rezoning, approval process, and implementation timeline. No changes were made to the site plan as a result of the meeting.

Municipal Comments

Mineral Springs was not consulted due to the distance to their municipal limits.

Recommendations

Land Use Board

The Land Use Board reviewed this rezoning request at its May 19, 2026 meeting and unanimously recommended approval based on consistency with the land use map and business opportunities for owner.

Planning Department

This part of Union County is identified as an Employment Corridor overlaid on rural residential and agricultural land uses. The proposed use is allowed in Light Industrial, which is an appropriate zoning designation in an Employment Corridor. The proposed traffic impacts are moderate and this use will increase business opportunities in Union County. The proposed use is therefore considered appropriate for the area. Because of these aspects of the development, staff recommend **approval** of this rezoning application.

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2026-005)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-005) submitted by Jeremy McAteer, requesting a revision of the Union County Zoning Map by rezoning a 5.75 acre portion of one parcel totaling approximately 17.21 acres appearing on the tax map as tax parcel 09-384-013 on South Rocky River Road from RA-40 to Light Industrial (LI) with Conditions.

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

Motion

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

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

Motion

(i) Deny rezoning petition CZ-2026-005 from Jeremy McAteer; and (ii) adopt the consistency and reasonableness statement for denial.

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

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-005) submitted by Jeremy McAteer, requesting a revision of the Union County Zoning Map by rezoning a 5.75 acre portion of one parcel totaling approximately 17.21 acres appearing on the tax map as tax parcel 09-384-013 on South Rocky River Road from RA-40 to Light Industrial (LI) with Conditions.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2026-005)

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

1. The proposed use is consistent with the Plan. The Plan's Land Use Map identifies this area as Employment Corridor overlay. The Plan provides that a variety of employment uses may be appropriate in an Employment Corridor. Such uses that may be appropriate include, without limitation, distribution, logistics, aeronautics, industrial, and agri-business. A rezoning to Light Industrial would allow for many of these development uses contemplated for an Employment Corridor under the Plan.
2. The parcel of land is a larger parcel (over five acres) and is reasonable in size for the proposed zoning district.
3. An immediately adjacent property is already zoned as Light Industrial, as well as legally non-conforming commercial uses immediately north of the proposed use.
4. The benefits to the community at large, the neighbors, and the property owners of the proposed rezoning outweigh any detriments to the neighbors and others caused by the rezoning. The benefits of this rezoning include potentially allowing for increased employment or business uses for the surrounding community to utilize, as well as developing an area designated in the Plan for development immediately adjacent to a significant transportation corridor in the County. The potential detriments of the proposed rezoning, depending upon the allowed use utilized in the proposed zoning district, include any increased noise, light, and traffic exposure from the use that could affect nearby properties.

CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE CURRENT PLAN) (CZ-2026-005)

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

1. Future allowed uses on the property under certain uses allowed in Light Industrial districts could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is a noted concern in the Plan.
2. The property is within a Water Supply Watershed, which limits development intensity in order to protect the City of Monroe's water supply. The proposed use would increase development intensity on an existing undeveloped parcel. Supporting safe drinking water is noted under the Plan.
3. The proposed rezoning may facilitate ongoing and potential future industrial uses in close proximity to existing residential uses, including residential uses in nearby areas identified as Rural Residential.

AFFP
PUBLIC NOTICE NOTICE IS HERE

Affidavit of Publication

STATE OF NC }
COUNTY OF } Union SS

Kimberly Cook, being duly sworn, says:

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

May 27, 2026, June 03, 2026

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

Kimberly Cook
Billing Clerk

Subscribed to and sworn to me this 3rd day of June 2026.

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

My commission expires: March 06, 2027

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

00003753 71490471

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

PUBLIC NOTICE

NOTICE IS HEREBY GIVEN that the Union County Board of Commissioners will meet on Tuesday, June 16, 2026, at 6:00 p.m. in the Commissioners' Board Room, Room 118, First Floor, Union County Government Center, 500 North Main Street, Monroe, North Carolina, to conduct a public hearing and receive comments from the public on the petition set forth below.

Rezoning petition (CZ-2026-005) submitted by Jeremy McAteer, requesting a revision of the Union County Zoning Map by rezoning a 5.75 acre portion of one parcel totaling approximately 17.21 acres appearing on the tax map as tax parcel 09-384-013 on South Rocky River Road from RA-40 to Light Industrial (LI) with Conditions.

The proposed modifications may later undergo, without further notice, substantial changes resulting from objections, debate, and discussions at the hearing.

The documents related to the proposed petition are available for inspection and study at the Union County Planning Department located at 500 North Main Street, Suite #70, Monroe, NC from 8:00 a.m. to 5:00 p.m. Monday through Friday. Anyone having any questions on the above petition may contact the Planning Department at 704-283-3565.

Any person requesting a sign language interpreter or any person requesting any other special assistance needed due to a disability under the Americans with Disabilities Act should call (704) 283-3810 and make a request at least 96 hours in advance.

Lynn G. West
Clerk to the Board

May 27, June 3, 2026

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

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

WHEREAS, Union County has received rezoning petition (CZ-2026-005) submitted by Jeremy McAteer, requesting a revision of the Union County Zoning Map by rezoning a 5.75 acre portion of one parcel totaling approximately 17.21 acres appearing on the tax map as tax parcel 09-384-013 on South Rocky River Road from RA-40 to Light Industrial (LI) with Conditions (the "Rezoning Petition"); and

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

WHEREAS, the Board has determined that approval of the Rezoning Petition and rezoning the subject parcel from RA-40 to Light Industrial (LI) with Conditions is reasonable and in the public interest, including for those reasons set forth in the contemporaneously adopted consistency and reasonableness statement.

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

1. The Zoning Map is hereby amended by rezoning the parcel appearing on the tax map as tax parcel 09-384-013 along South Rocky River Road from RA-40 to Light Industrial (LI) with Conditions.

2. The conditions accepted by the Applicant are hereby approved and incorporated into the Light Industrial (LI) with Conditions rezoning of the parcel.

3. This ordinance is effective upon adoption.

Adopted this _____ day of _____, 2026.

_____
Brian Helms
Chair, Union County Board of Commissioners

File #: 26-369 **Agenda Date:** 7/20/2026

TITLE:

Rezoning Petition 2026-CZ-007 Beulah Church

INFORMATION CONTACT:

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

ACTION REQUESTED:

To make a decision on this rezoning petition, the Board of Commissioners can consider the following motions.

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

Motion

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

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

Motion

(i) Deny rezoning petition CZ-2026-007 submitted by R. Dean Harrell; and (ii) adopt the consistency and reasonableness statement for denial

PRIOR BOARD ACTIONS:

June 16, 2026, Regular Meeting, Agenda Item # 26-321 - Public Hearing Held

BACKGROUND:

This case is a request to rezone a 3.21 acre parcel appearing on the tax map as tax parcel 06-042-001J located on Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions. The rezoning request is an amendment to an existing conditional rezoning on the site and includes the following amended conditions:

1) Hours of operation changed from 9:00 AM to 9:00 PM to 6:30 AM to 9:30 PM
2) Any required privacy fence will be made of solid material to reduce noise
3) Trash and recycling pickup will occur between 9:00 AM and 5:00 PM

The second and third conditions were added by the Land Use Board at its May 19, 2026 meeting as a response to resident concerns over noise. These additional conditions were agreed to by the applicant. The Land Use Board then recommended approval on a 7-0 vote, citing consistency with the land use map used in the initial rezoning and increased flexibility for the owner.

A public hearing was conducted on June 16, 2026. No one spoke for or against the rezoning,

although one resident submitted written comments noting concerns that had been addressed with revised conditions.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

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

General Information

Project Address 4991 WAXHAW Indian TRAIL Rd City MATTHEWS State NC. Zip 28104

Tax Parcel ID 06042001J Current Zoning Designation CZ B-2 Total Acres 3.21

Proposed Zoning Designation SAME/CZ B-2 Date Submitted MARCH 20/26

Contact Information

Applicant Name BEULAH CHURCH Rd. Developers LLC/ R. Dean Harrell

Address 5615 Potter Rd. City MATTHEWS State NC. Zip 28104

Phone 704-564-4815 Fax _____ Email _____

Property Owner Name Beulah ch Rd Developers

Address 5615 Potter Rd City MATTHEWS State NC Zip 28104

Phone 704-564-4815 Fax _____ Email _____

Applicant's Certification

R. Dean Harrell
Signature

March 20/26
Date

R. DEAN HARRELL
Member MANAGER
Printed Name/Title

Owner's Certification (include names and signatures of all owners)

R. Dean Harrell
Signature

MARCH 20/26
Date

R. DEAN HARRELL
Printed Name/Title

Darren L Sutton
Signature

03/20/26
Date

Darren L. Sutton
Printed Name/Title

Union County Office Use Only:

Case Number: 2026-CZ-007 Beulah Church Date Received: 3-20-26

Amount of Fee: $1000 Fee Ok: BH Received by: BH

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

UNIONCOUNTY north carolina

**This document is only valid from July 1, 2024 - June 30, 2025

Stonebow Commercial Center

Located at the corner of Beulah Church Road & Indian Trail Waxhaw Rd. Parcel# 06042001J.

The initial zoning was approved on October 19 2020 with conditions. A line item within those conditions' states that "Hours of operation" are between 9 AM and 9 PM. We are asking that a modification of this time to extend from 6:30 AM to 9:30 PM.

This request is due to several tenants, Example; Animal Hospital, Urgent Care, Restaurant, need to have the flexibility to open the doors earlier for their customers and thus supporting the success of this project.

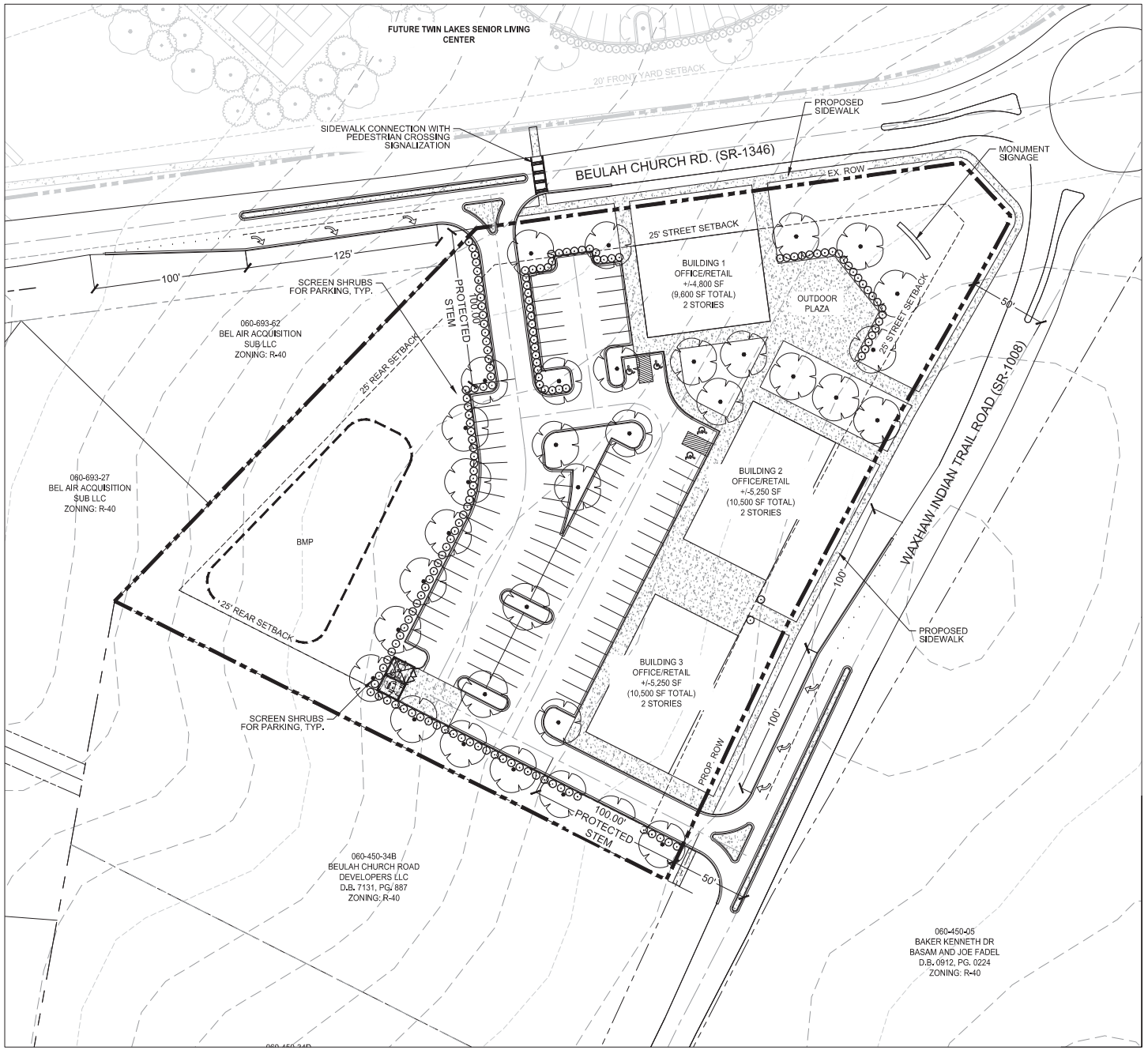
Thank you in advance for your consideration.

R. Dean Harrell

Beulah Church Road Developers

Stonebow Commercial

R. Dean Harrell



DISCLAIMER: PETITIONER SHALL DEVELOP THE SITE IN A MANNER GENERALLY CONSISTENT WITH THE CONCEPTUAL MASTER PLAN, WITH THE UNDERSTANDING THAT THE CONFIGURATIONS, PLACEMENTS, HEIGHT AND SIZES OF BUILDINGS, PARKING AREAS AND OPEN SPACES MAY BE ALTERED OR MODIFIED AS LONG AS THE ULTIMATE DESIGN IS CONSISTENT WITH THE SPIRIT AND INTENT OF THE CONCEPTUAL MASTER PLAN.

THE CONFIGURATIONS, PLACEMENTS, NUMBER AND SIZES OF THE BUILDINGS AND TREATMENT OF OPEN SPACE AREAS DEPICTED ON THE CONCEPTUAL MASTER PLAN AND ANY BUILDING DESIGNS DEPICTED ARE CONCEPTUAL IN NATURE AND THEREFORE ARE SUBJECT TO REFINEMENTS AS PART OF THE TOTAL DESIGN PROCESS. THEY MAY, THEREFORE, BE ALTERED OR MODIFIED, IN ACCORDANCE WITH THE UNION COUNTY DEVELOPMENT ORDINANCE, DURING DESIGN DEVELOPMENT AND CONSTRUCTION DOCUMENT PHASES SO LONG AS THE MAXIMUM BUILDING ENVELOPE LINES AND INTENSITY LIMITATIONS ESTABLISHED ON THE TECHNICAL DATA SHEET ARE NOT VIOLATED AND THE PROPOSED ALTERATIONS OR MODIFICATIONS DO NOT EXCEED THE PARAMETERS ESTABLISHED UNDER THE DEVELOPMENT CONDITIONS AND UNDER THE UNION COUNTY DEVELOPMENT ORDINANCE FOR THE B-2 DISTRICT.

THE INTENT OF THE CONCEPTUAL MASTER PLAN IS TO ESTABLISH A MAXIMUM SQUARE FOOTAGE THAT CAN BE ADEQUATELY PARKED PER THE REGULATIONS OF THE UNION COUNTY DEVELOPMENT ORDINANCE. THE CONCEPTUAL MASTER PLAN DOES NOT BIND THE PETITIONER TO PROVIDE THIS MAXIMUM SQUARE FOOTAGE AS THE PROGRAM IS REFINED TO THE END USER DURING THE LAND DEVELOPMENT PROCESS.

LandDesign.
223 NORTH GRAHAM STREET
CHARLOTTE, NC 28202
704.333.0325
WWW.LANDDESIGN.COM

KEY MAP

SEAL

LANDDESIGN INC CORPORATE SEAL NORTH CAROLINA

NOT FOR CONSTRUCTION

PROJECT

BEULAH CHURCH COMMERCIAL

BEULAH CHURCH ROAD DEVELOPERS, LLC

LANDDESIGN PROJECT 1018342

REVISION / ISSUANCE

NO.	DESCRIPTION	DATE
1	REZONING SUB.	09.18.18
2	REZONING SUB.	12.13.18
3	REZONING SUB.	12.06.19
4	REZONING SUB.	7.21.2020

DESIGNED BY: MEK
DRAWN BY: MEK
CHECKED BY: LDI

SCALE: VERT: N/A HORZ: 1"=30' (0, 15', 30', 60')

NORTH

SHEET TITLE

CONCEPTUAL SITE PLAN

SHEET NUMBER

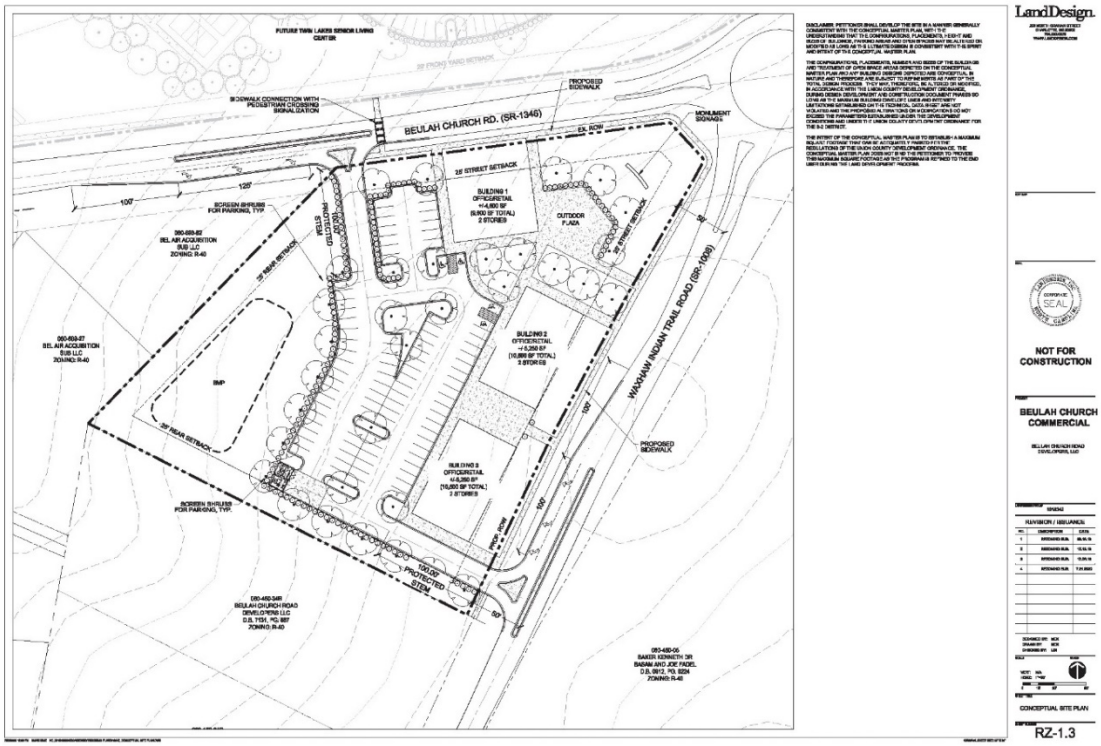
RZ-1.3

ORIGINAL SHEET SIZE: 24" X 36"

Rezoning Request CZ-2026-007 Beulah Church

This case is a request to rezone a 3.21 acre parcel appearing on the tax map as tax parcel 06-042-001J located on Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions. The rezoning request is an amendment to an existing conditional rezoning on the site and includes the following amended conditions:

1) Hours of operation changed from 9:00 AM to 9:00 PM to 6:30 AM to 9:30 PM
2) Any required privacy fence will be made of solid material to reduce noise
3) Trash and recycling pickup will occur between 9:00 AM and 5:00 PM



Contact Information

1. Staff: Bjorn Hansen, Senior Planner, 704-283-3690, bjorn.hansen@unioncountync.gov

Planning Department
500 North Main Street, Suite 70
Monroe, NC 28112
T 704.283.3565
unioncountync.gov

2. Owner: Beulah Church Road Developers, LLC, 5615 Potter Road, Matthews, NC 28104
3. Applicant: Beulah Church Road Developers, LLC, 5615 Potter Road, Matthews, NC 28104

Property Information

Located on the southwest corner of Beulah Church and Waxhaw Indian Trail roads. Location more specifically described as tax parcel 06-042-001J.



Site



North of Site



West of Site



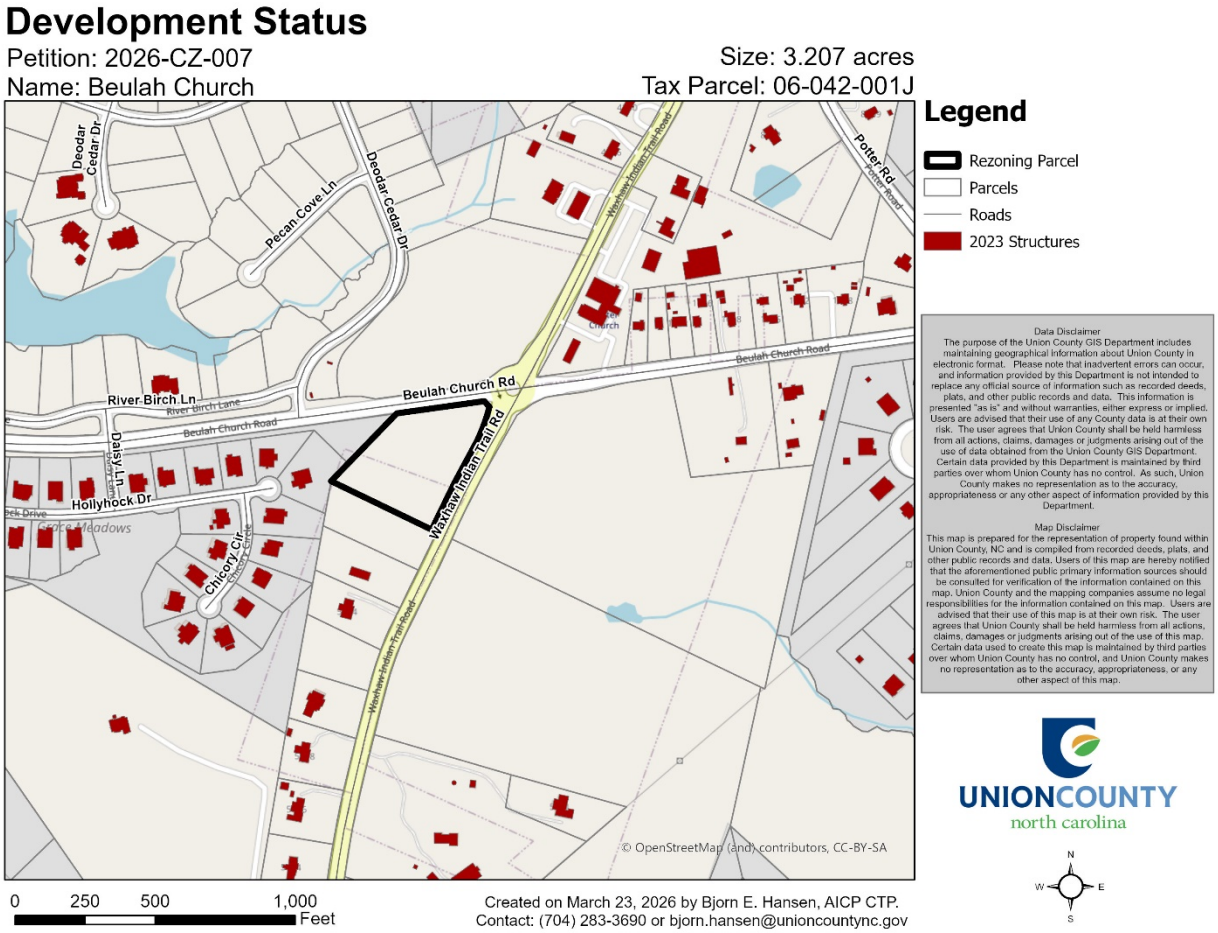
East of Site

Municipal Proximity

The site is near Wesley Chapel and Weddington.

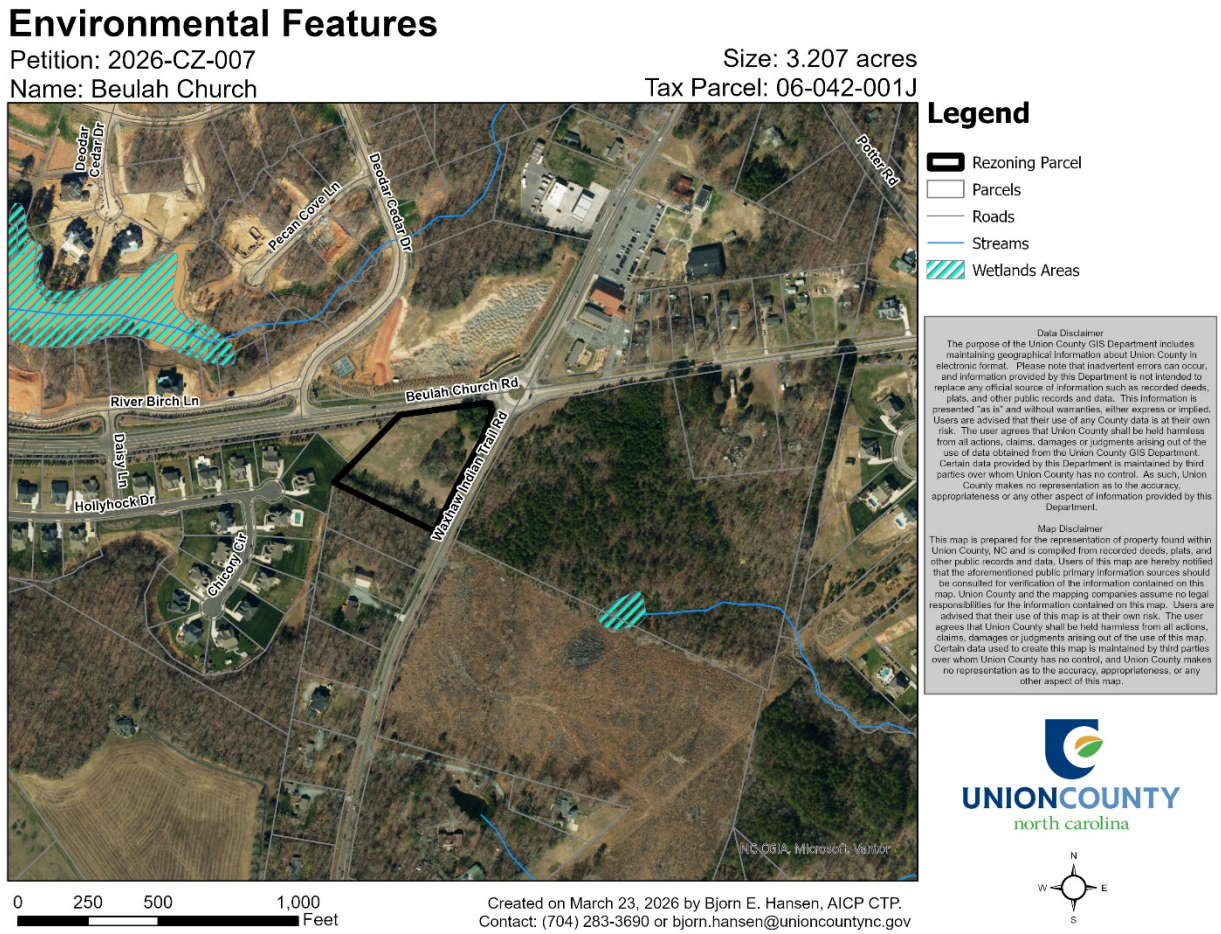
Existing Land Use and Development Status

The parcel is currently zoned B-2 with Conditions and is undeveloped and partially forested.



Environmental Features

There are no streams, wetlands, or floodplains on the site.

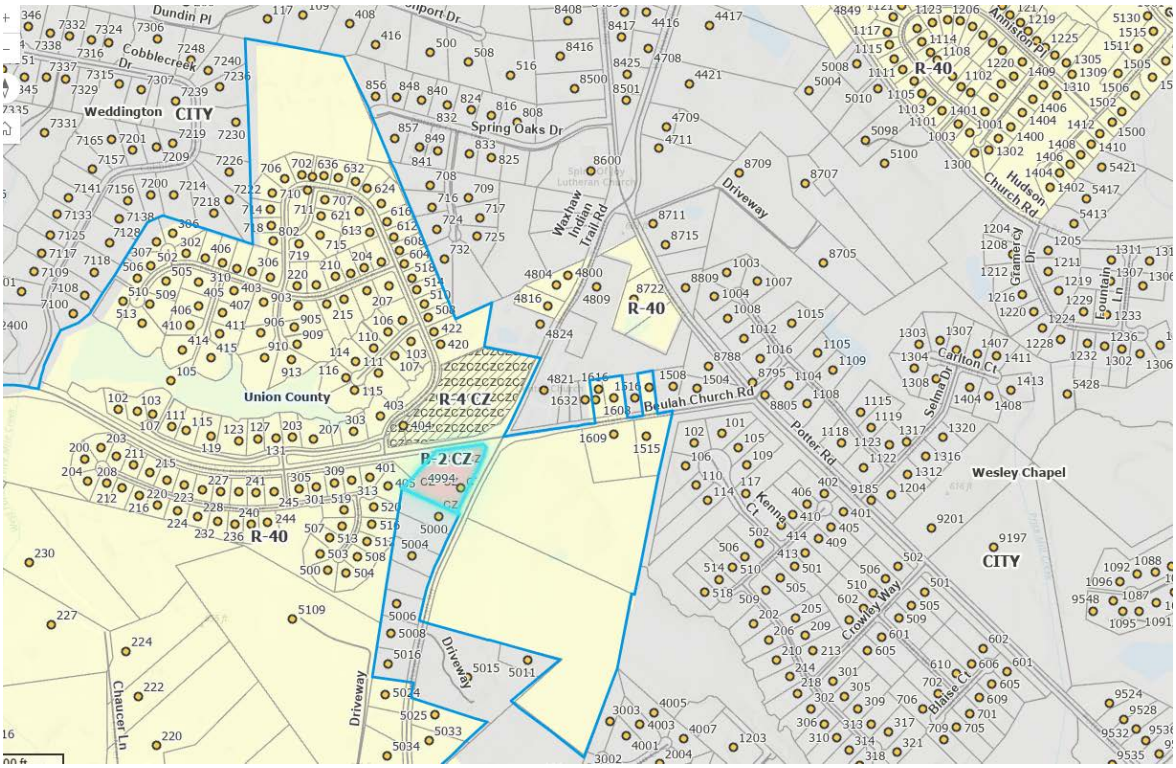


Utilities

Water and sewer are available to the site.

Zoning and Land Use History

This property was rezoned to B-2 with Conditions in early 2020 to allow a shopping center to be built. It was previously proposed for rezoning to B-2 in 2007, but was withdrawn. A 161 acre parcel to the north of the site was proposed for R-20 zoning in 1998, but was withdrawn. There later were two successful rezonings in 2018 and 2019 to rezone eight acres for a senior living facility on the north side of Beulah Church. There have been no other zoning actions in the immediate vicinity in unincorporated Union County.

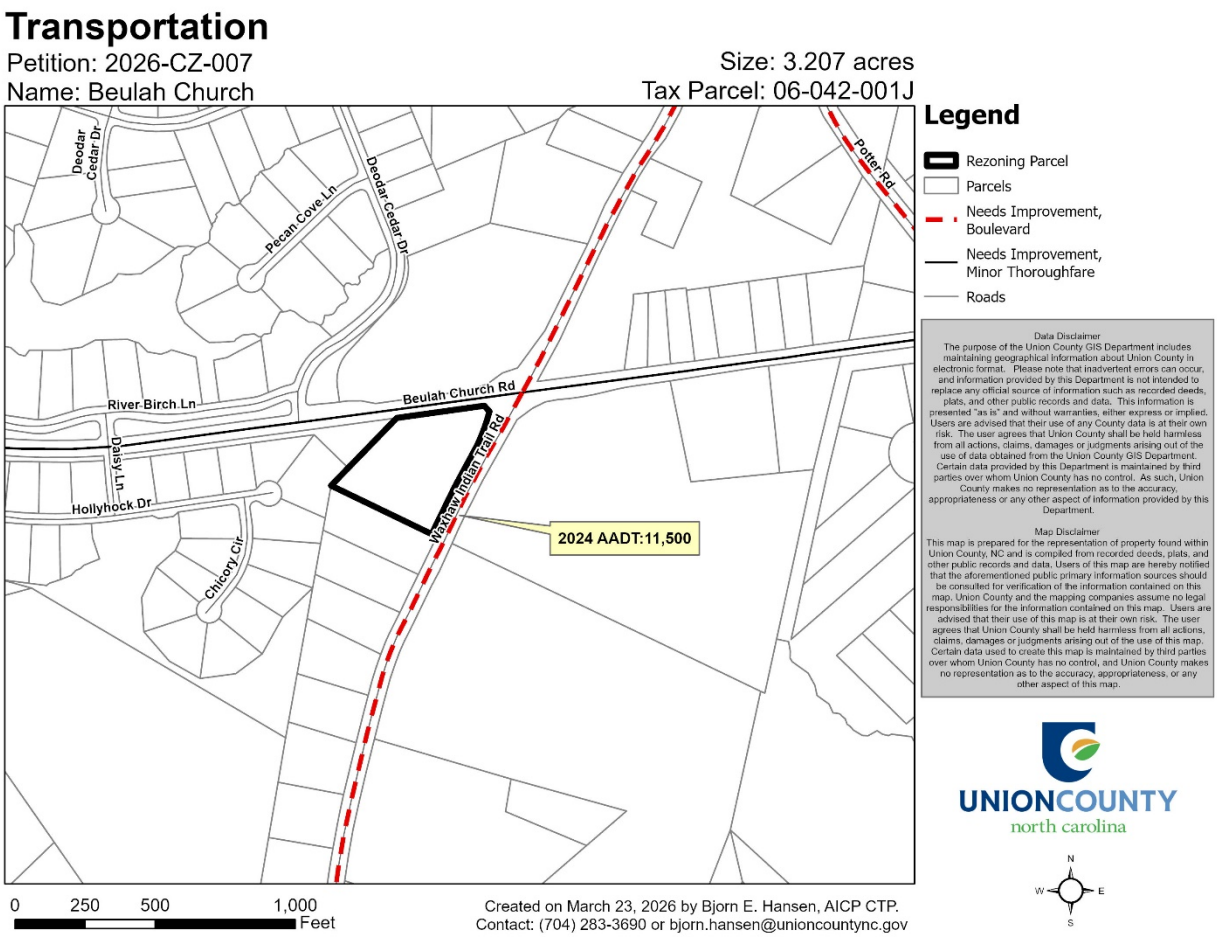


Schools

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

Transportation

This site is on Beulah Church and Waxhaw Indian Trail Roads, which are a NCDOT-maintained facility. This section of Waxhaw Indian Trail Road carries approximately 11,500 vehicles per day. There are no funded road improvement projects in the immediate vicinity of the rezoning. A traffic Impact Analysis (TIA) was not required for this amended rezoning. The site already has conditions for a median, crosswalk, and turn lanes into the site.

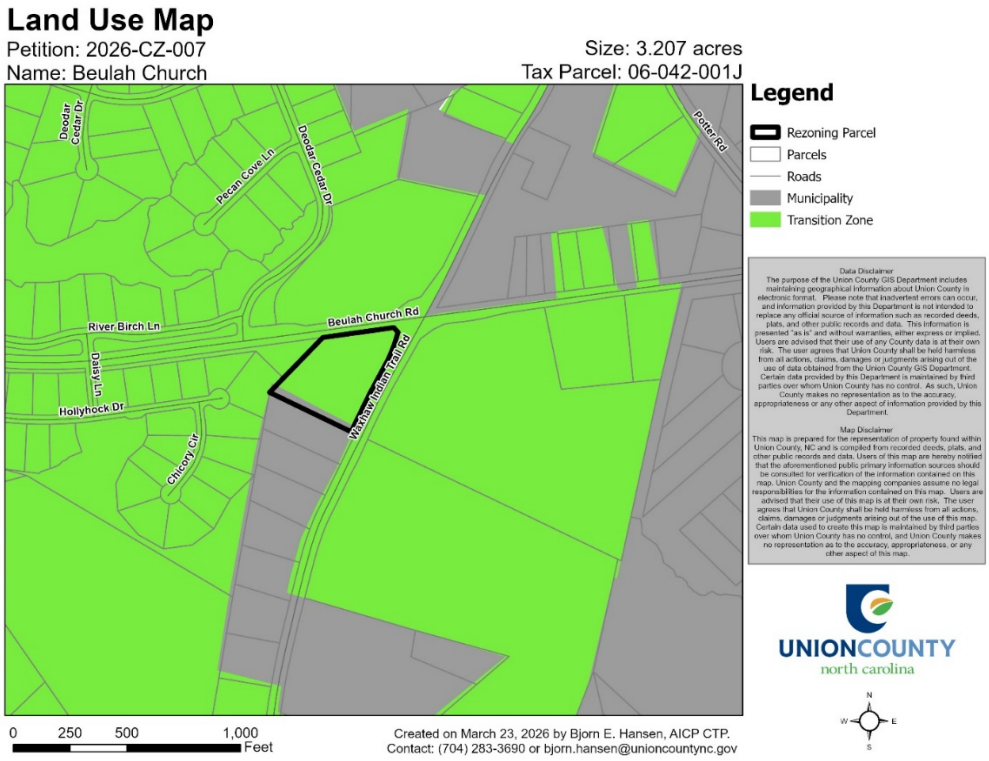


Union County Comprehensive Plan

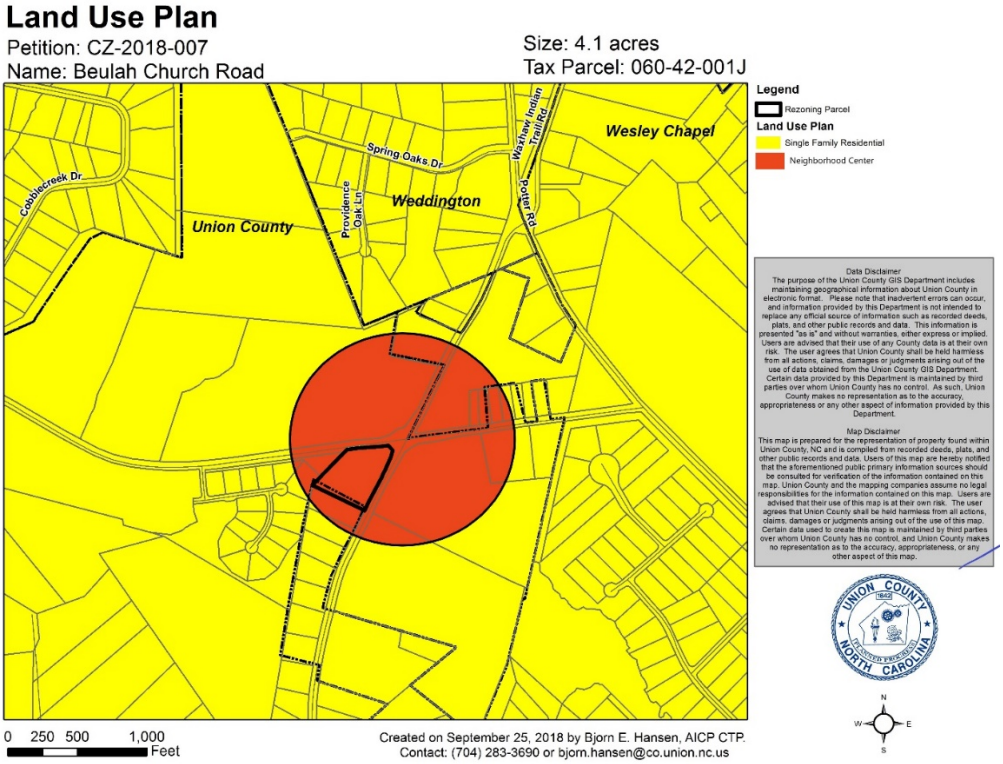
The initial 2020 rezoning for this property was evaluated against the comprehensive plan and land use map in place at the time. The land use map was amended as part of the rezoning to include a commercial node at the intersection, which was consistent with development patterns in the area. This proposed rezoning is consistent with the land use map used as part of the 2020 rezoning.

The Union County 2050 land use map identifies the entire area as a Transition Zone, which recognizes the limited amount of unincorporated land and close proximity to several municipalities as reasons to restrict rezonings in this area and instead incentivize them to annex into an adjacent municipality.

2050 Plan Land Use Map



2014 Plan Land Use Map



Public and Municipal Comments

Public Comments

A community meeting was required and was held on April 15, 2026. A total of 17 residents attended the meeting and expressed concern over the proposed hours of operation as well as the overall development. No changes were made to the site plan as a result of the meeting. Two residents spoke against the rezoning at the May 19, 2026 Land Use Board meeting, citing concerns over safety and noise.

Municipal Comments

Weddington and Wesley Chapel were consulted due to the distance to their municipal limits. No responses were received.

Recommendations

Land Use Board

The Land Use Board unanimously recommended approval at its May 19, 2026 meeting after adding two conditions, limiting trash pick up to between 9 AM to 5 PM and requiring the privacy fence to be built of solid materials to reduce noise. The Board cited consistency with the land use map used in the initial rezoning and increased flexibility for the owner.

Planning Department

This part of Union County at the time of the initial 2020 rezoning was identified is identified for single family residential at approximately two units per acre, with a Neighborhood Center commercial node at the intersection of this rezoning. The Land Use Map was subsequently modified through the 2050 Comprehensive Plan to recognize the limited amount of unincorporated land in the area and designated the area as a Transition Zone, meaning upzonings would not be supported. The proposed rezoning is not an upzoning of existing zoning on the site, is consistent with the land use map in place at the time of the initial rezoning and provides additional flexibility to the property owner as they develop the site. The proposed use is therefore considered appropriate for the area. Because of these aspects of the development, staff recommend **approval** of this rezoning application.

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2026-007)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-007), submitted by R. Dean Harrell, requesting a revision of the Union County Zoning Map by rezoning an approximately 3.207 acre parcel of land appearing on the tax map as tax parcel 06-042-001J along the south side of Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions.

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

Motion

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

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

Motion

(i) Deny rezoning petition CZ-2026-007 submitted by R. Dean Harrell; and (ii) adopt the consistency and reasonableness statement for denial.

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

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-007), submitted by R. Dean Harrell, requesting a revision of the Union County Zoning Map by rezoning an approximately 3.207 acre parcel of land appearing on the tax map as tax parcel 06-042-001J along the south side of Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE CURRENT PLAN) (CZ-2026-007)

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

1. The proposed use under the amendment is consistent with the 2014 Land Use Plan, which was in place at the time of initial rezoning of the property in 2020 to B-2 with Conditions. The 2014 Plan's Land Use Map identified this area as a Commercial Center. The Commercial Center designation would support a range of retail and service uses, consistent with the existing allowed uses. The current Plan's Land Use Map now designates this area as a Transition Zone. The Transition Zone designation encourages, but does not require, developers to consider annexation into an adjacent municipality. The Plan also provides a strategy of Union County not approving rezonings in a Transition Zone which would "upzone" the property and increase density or intensity of uses. The modified condition of several additional hours of operating hours does not increase density or the overall allowed uses under the property. Rather, it is an operational condition change which does not reach such an impact and is consistent with the Plan.
2. The proposed change in the condition of hours of operation would still prohibit late night operations (prohibiting hours of operation between 9:30 p.m. to 6:30 a.m.) that could impact adjacent residential areas.
3. The tract of land is not overly small for the general area in which it is located and is reasonable in size for the modified conditions contemplated.
4. The property itself is already zoned for B-2 uses with conditions. Additionally, the property is located less than 0.2 miles from an existing retail business use with currently almost the same operating hours as proposed under the modified conditions.
5. The use set forth under the conditions would meet Union County development standards.
6. The benefits to the community at large, the neighbors, and the property owners of the proposed rezoning outweigh any detriments to the neighbors and others caused by the rezoning. The benefits of this rezoning include allowing retail and service business opportunities in Union County. The potential detriments of the use established by this

rezoning include any increased noise, light, and traffic exposure resulting from the proposed use that could affect nearby properties.

CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE CURRENT PLAN) (CZ-2026-007)

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

1. The proposed rezoning could facilitate additional ongoing and potential commercial rezonings in the immediate area inconsistent with the current Land Use Map in Transition Zones, including in close proximity to existing residential uses.
2. Allowed hours of operation on the property could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is a noted concern in the Plan.

AFFP

PUBLIC NOTICE NOTICE IS HERE

Affidavit of Publication

STATE OF NC } SS
COUNTY OF } Union

Kimberly Cook, being duly sworn, says:

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

May 27, 2026, June 03, 2026

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

SIGNED:

Kimberly Cook

Billing Clerk

Subscribed to and sworn to me this 3rd day of June 2026.

Barbara M Daniels

Barbara M Daniels, Notary, Guilford , County, NC

My commission expires: March 06, 2027

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

00003753 71490479

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

PUBLIC NOTICE

NOTICE IS HEREBY GIVEN that the Union County Board of Commissioners will meet on Tuesday, June 16, 2026, at 6:00 p.m. in the Commissioners' Board Room, Room 118, First Floor, Union County Government Center, 500 North Main Street, Monroe, North Carolina, to conduct a public hearing and receive comments from the public on the petition set forth below.

Rezoning petition (CZ-2026-007), submitted by R. Dean Harrell, requesting a revision of the Union County Zoning Map by rezoning an approximately 3.207 acre parcel of land appearing on the tax map as tax parcel 06-042-001J along the south side of Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions.

The proposed modifications may later undergo, without further notice, substantial changes resulting from objections, debate, and discussions at the hearing.

The documents related to the proposed petition are available for inspection and study at the Union County Planning Department located at 500 North Main Street, Suite #70, Monroe, NC from 8:00 a.m. to 5:00 p.m. Monday through Friday. Anyone having any questions on the above petition may contact the Planning Department at 704-283-3565.

Any person requesting a sign language interpreter or any person requesting any other special assistance needed due to a disability under the Americans with Disabilities Act should call (704) 283-3810 and make a request at least 96 hours in advance.

Lynn G. West
Clerk to the Board

May 27, June 3, 2026

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

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

WHEREAS, Union County has received rezoning petition (CZ-2026-007), submitted by R. Dean Harrell, requesting a revision of the Union County Zoning Map by rezoning an approximately 3.207 acre parcel of land appearing on the tax map as tax parcel 06-042-001J along the south side of Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions (the "Rezoning Petition"); and

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

WHEREAS, the Board has determined that approval of the Rezoning Petition and rezoning the subject parcel from B-2 with Conditions to B-2 with Modified Conditions is reasonable and in the public interest, including for those reasons set forth in the contemporaneously adopted consistency and reasonableness statement.

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

1. The Zoning Map is hereby amended by rezoning the approximately 3.207 acre parcel appearing on the tax map as tax parcel 06-042-001J along the south side of Beulah Church Road from B-2 with Conditions to B-2 with Modified Conditions.

2. The conditions accepted by the Applicant are hereby approved and incorporated into the B-2 with Modified Conditions rezoning of the parcel.

3. This ordinance is effective upon adoption.

Adopted this _____ day of _____, 2026.

_____
Brian Helms
Chair, Union County Board of Commissioners

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

File #: 26-358 **Agenda Date:** 7/20/2026

TITLE:

Board Discussion on Public Schools Statutory Funding Formula

INFORMATION CONTACT:

Brian Matthews, County Manager

ACTION REQUESTED:

Direct staff to contact Union County's delegation to request changes to the statutory funding formula for public schools

PRIOR BOARD ACTIONS:

None

BACKGROUND:

The Board of Commissioners requested that staff place this item on the agenda for discussion and provide direction to staff regarding this issue.

FINANCIAL IMPACT:

None