Union County, NC

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

Meeting Agenda

Monday, May 18, 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

26-287 **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. 153A-98; and
2) pursuant to G.S. 143-318.11(a)(3), to consult with an attorney in order to preserve the attorney-client privilege; and
3) pursuant to G.S. 143-318.11(a)(6), to consider the qualifications, competence, performance, character, fitness, conditions of appointment, or conditions of initial employment of an individual public officer or employee or prospective public officer or employee; or to hear or investigate a complaint, charge, or grievance by or against an individual public officer or employee.
FINANCIAL IMPACT:
None.

Opening of Meeting - 6:00 PM

Invocation - Commissioner Clancy Baucom

Pledge of Allegiance

Informal Comments

Public Hearing(s)

26-270 **Public Hearing - Rezoning Petition CZ-2026-001 Marcham**

INFORMATION CONTACT:
John Wear, Planning Department, Senior Planner - Current Planning, 704-283-3605
ACTION REQUESTED:
Conduct public hearing for proposed rezoning.
PRIOR BOARD ACTION:
None.
BACKGROUND:
This case is requesting to rezone one parcel totaling 5 acres appearing

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

1) Limited to approved site plan dated April 7, 2026
2) Uses limited to landscaping supply business and construction equipment storage
3) Five-year vesting of development rights
4) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval
5) Access may be restricted to right in right out in the future, at the discretion of the NCDOT, based on safety issues that may be created by this site

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

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

If the Board of Commissioners wishes to make a decision on the rezoning petition, it 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-2026-001; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

26-271 **Public Hearing - Rezoning Petition CZ-2026-006 House of Pearls**

INFORMATION CONTACT:

John Wear, Planning Department, Senior Planner - Current Planning, 704-283-3605

ACTION REQUESTED:

Conduct public hearing for proposed rezoning.

PRIOR BOARD ACTION:

None.

BACKGROUND:

This case is a request to rezone an approximately 10.92 acre portion of one parcel totaling 12.21 acres appearing on the tax map as tax parcel 02-226-017 located on Camden Road from RA-40 to a Master Planned Development District. The request is to develop a long-term residential drug rehabilitation facility for up to 80 residents and staff. The rezoning request is a conditional rezoning and includes the following conditions:

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

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

If the Board of Commissioners wishes to make a decision on the rezoning petition, it 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-2026-006; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

Consent Agenda

26-258 **Contract - NCDOT Project U-4714AC (SR 1009 Old Monroe Road) - Utility PE and Construction Agreement**

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 North Carolina Department of Transportation (NCDOT) 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 (UCW) Capital Improvement Program (CIP) includes an allocation for the design and construction of water line and sewer line betterments related to NCDOT's multi-phase project for the widening of Old Monroe Road. This agreement with NCDOT is for the phase of the Old Monroe Road widening project from the Mecklenburg County line to near Morningside Meadows Lane. The water line betterments will increase the existing 6-inch and 8-inch water lines to 12-inch and 16-inch water lines to provide sufficient fire flow and pressure to meet future demand. The sewer line betterments will replace the existing 4-inch and 6-inch septic tank effluent gravity (STEG) wastewater collection system with standard 8-inch gravity sewer lines.

The water and sewer betterments will be administered by NCDOT as part of the Old Monroe Road widening project. UCW will be responsible for reimbursing NCDOT for the betterment costs in a not to exceed amount of $1,359,307.81.

FINANCIAL IMPACT:

Funding is available within the adopted account 60185527 - 853 West

Zone Transmission Main Phase 4 to support the contract amount of $1,359,307.81.

26-259 **Contract - NCDOT Project U-4714BA (SR 1009 Old Monroe Road) - Utility PE and Construction Agreement**

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 North Carolina Department of Transportation (NCDOT) 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 (UCW) Capital Improvement Program (CIP) includes an allocation for the design and construction of water line and sewer line betterments related to NCDOT's multi-phase project for the widening of Old Monroe Road. This agreement with NCDOT is for the phase of the Old Monroe Road widening project from Morningside Meadows Lane to South Fork Road. The water line betterments will increase the existing 6-inch water line to an 8-inch water line and will install a new 16-inch water transmission main to provide sufficient fire flow and pressure to meet future demand. The sewer line betterments will replace the existing 4-inch and 6-inch septic tank effluent gravity (STEG) wastewater collection system with standard 8-inch gravity sewer lines.

The water and sewer betterments will be administered by NCDOT as part of the Old Monroe Road widening project. UCW will be responsible for reimbursing NCDOT for the betterment costs in a not to exceed amount of $3,221,261.68.
FINANCIAL IMPACT:
Funding is available within the adopted account 60185527 - 853 West Zone Transmission Main Phase 4 to support the contract amount of $3,221,261.68.

26-282 **Contract - Aeration Tank Cleaning**

INFORMATION CONTACT:
Christopher Clark, PE, Union County Water, Water and Wastewater Operations Director, 704-296-4215
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 Water owns and operates five Water Reclamation Facilities. As part of routine operations and maintenance of the facility, aeration tanks are put into and taken out of service for inspection, maintenance and operation. Over time debris such as rags, grit, sludge and other debris build up in the tanks and must be removed and disposed of offsite.

The Procurement Department partnered with Union County Water to issue Request for Proposals #2026-044 Aeration Tank Cleaning. On March 17, 2026, five proposals were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. As a result, the team requests approval to enter into a contract with the top scoring/ranked preferred offeror, Wind River Environmental, LLC, to provide Aeration Tank Cleaning services. This contract has a term of one year.

FINANCIAL IMPACT:

The anticipated cost for this service is $250,000. Sufficient funds were allocated in the FY26 Budget to cover costs associated with this agreement.

26-289 **Contract - Crooked Creek WRF Filter Replacement**

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 Hazen and Sawyer, P.C. substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Capital Improvement Program for Union County Water, as adopted by the Board of County Commissioners, includes funding for rehab and renewal of the Crooked Creek WRF. An evaluation was completed on the Crooked Creek WRF to assess the condition of the facility and identify infrastructure that requires improvements. The filter equipment provides treatment to meet NCDEQ effluent discharge limits. The existing filters are no longer operational due to their age and inability to source outdated components necessary for repair; therefore, this filter replacement project

was identified as the first priority for replacement for the facility to continue to comply with its effluent discharge limits.

Hazen and Sawyer, P.C. has been selected to provide engineering design and bid services for Task Order 10022-01: Crooked Creek WRF Filter Replacement. Hazen and Sawyer, P.C. was chosen from a list of vendors previously selected from RFQ 2026-002 - Engineering Services for Water Reclamation Facility Improvements to provide these services for Union County Projects.

FINANCIAL IMPACT:

The total cost of Task Order 10022-01 with Hazen and Sawyer, P.C. is $512,000.00. Sufficient funds are available within the adopted capital account 60185100 - Crooked Creek WRF Filter Replacement.

26-278 **Agreement with Town of Waxhaw for Library Book Locker at Waxhaw Learning Center**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the interlocal agreement with the Town of Waxhaw for the Library Book Locker Unit at the Waxhaw Learning Center.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Town of Waxhaw worked with the Library to determine the most effective way to provide a library service at the Waxhaw Learning Center, the former location of the Waxhaw Library. A smart book locker was selected as the preferred option due to its ease of use and cost-effective model that requires no County funding for materials or equipment. At the request of the Town of Waxhaw, and in collaboration with Union County Library, a new book locker will be installed at the Waxhaw Learning Center, located at 509 S. Providence Street, to expand convenient access to library materials for residents in the surrounding community.

The smart locker system allows patrons to pick up and return holds through a secure, self-service process with 24/7 access to reserved items. Holds placed through the library catalog are delivered to secure compartments by the library's courier, and patrons are notified when items are ready. Using a Union County library card, patrons access their assigned compartment, and items are automatically checked out upon retrieval. This model extends library access beyond regular hours while maintaining secure and efficient service.

The Town of Waxhaw will fund the purchase of the unit using a donation from the Library Association of Waxhaw (L.A.W.), oversee its installation, and cover ongoing subscription and maintenance costs. Union County Library will partner in delivering the materials and maintaining the locker

as part of its services until the locker reaches its end of life.

FINANCIAL IMPACT:

None.

26-266 **2026 Union County Jail Bond Referendum**

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt 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 2) Adopt 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.

PRIOR BOARD ACTIONS:

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 Resolution directing publication of notice of intent to apply to the Local Government Commission (LGC) authorizes the Clerk to the Board to publish in the Enquirer Journal the Notice of Intention to Apply to the LGC for approval of Union County Jail Bonds to be placed on the November 2026 election ballot.

The Resolution making certain statements of facts concerning the proposed jail bond issue and authorizing the application to the Local Government Commission presents certain findings of facts regarding the proposed bond issuance, financing, increase in taxes, marketing of bonds, estimated interest and authorizes the Finance Director to file with the LGC an application for approval of General Obligation Jail Bonds as described in the resolution.

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.

26-267 **Bid Award and Contract - Union County Sheriff's Office Fueling Station**

INFORMATION CONTACT:
Linda Whitaker, Facilities and Fleet Management, Assistant Director Design and Construction, 704-420-2626
ACTION REQUESTED:
1) Accept the low bidder, 2) authorize award of the contract to Rushing Contracting Group, Inc., in the amount of $391,067.20, 3) authorize the County Manager to i) negotiate and execute an agreement substantially consistent with this Agenda item and ii) terminate the agreement if deemed in the best interest of the County, each in the County Manager's discretion, and 4) adopt Resolution Providing Notice of Construction of the Union County Sheriff's Office Fueling Station.
PRIOR BOARD ACTIONS:
1) January 06, 2025, Regular Meeting, Agenda Item 25-001 Bid Award and Contract Union County Sheriff's Office Fueling Station, adopted CPO#367B and CPO#368A
2) June 02, 2025, Regular Meeting, Agenda Item 25-330 Rescinded Bid Award and Contract Union County Sheriff's Office Fueling Station
BACKGROUND:
This contract is to construct a new fueling station located at the rear of the Union County Sheriff's Office Administration building. This project was identified as a "Critical Infrastructure" project with a goal to provide an independent fuel supply for UCSO vehicles. The need was identified for this independent fuel supply during several disaster events that limited fuel supplies in the region and significantly impacted local gas stations which have served as the regular fuel supply for UCSO vehicles.

The project scope of work includes providing a 12,000-gallon fuel tank, dispensing system, and associated equipment. A three-sided enclosure will be constructed to conceal the fuel tank and provide enhanced security. The fuel management system will integrate with Union County's

existing fuel management system. Other accessory work includes replacing a section of asphalt with concrete, installing speed bumps to assist spill containment and traffic calming, and installing a security camera for area surveillance.

On February 13, 2026, the Procurement Department partnered with Facilities Management to issue an Invitation for Bid IFB 2026-020 Union County Sheriff's Office Fuel Station. On March 31, 2026, five (5) responsive bids for the title project were received and processed. All bids were tabulated, reviewed, and certified by Labella Associates, PC. The bids ranged from $391,067.20 to $716,304.06. Staff recommend that the project be awarded to the lowest responsive, responsible bidder, Rushing Contracting Group, Inc., Inc. in the amount of $391,067.20.

FINANCIAL IMPACT:

Funding is available within the adopted UC Fueling Stations capital account 40080210 to support the construction contract amount of $391,067.20.

26-269 **Tax Bill Correction Report for April 2026**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve Tax Bill Correction Reports for April 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:

April Refund amount = $5,399.17

26-276 **Interlocal Agreement - Stallings District S**

INFORMATION CONTACT:

Vann Harrell, Tax Administration, Tax Administrator, 704-283-3748

ACTION REQUESTED:

Authorize the County Manager to 1) negotiate and execute an agreement substantially consistent with the agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, 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 Tax Administration serves as the tax collector for the Town of Stallings pursuant to an interlocal agreement executed in 2015 and amended in 2022. District S located within the Town of Stalling was authorized by SL 2023-144 for the purpose of levying and collecting occupancy tax from lodging establishments located within the district. The District S governing board has requested Union County Tax Administration to function as the tax collector for occupancy taxes.

FINANCIAL IMPACT:

Union County will receive 1.25% of revenue collected pursuant to the agreement.

26-241 **Minutes for Approval**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes

PRIOR BOARD ACTIONS:

None

BACKGROUND:

The draft minutes have been emailed to the Commissioners for review.

FINANCIAL IMPACT:

None

Information Only

26-265 **Union County Public Schools Annual Financial Comprehensive Report Fiscal Year 2025**

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Public Schools has completed their ACFR for FY 2025 and has provided a copy based on Section XXIII of the Annual Adopted Budget Ordinance.

FINANCIAL IMPACT:

None.

26-272 **Communications Monthly Report - April 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.

26-290 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 April 2026 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 69.5%
- Percent of Actual + Permitted Flows = 88.2%
- Actual Flows (MGD) = 5.212
- Actual + Permitted Obligated Flows (MGD) = 6.612

Crooked Creek

- Percent of Actual Flows = 63.8%
- Percent of Actual + Permitted Flows = 91.4%
- Actual Flows (MGD) = 1.212
- Actual + Permitted Obligated Flows (MGD) = 1.736

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 = 38.0%
- Percent of Actual + Permitted Flows = 38.0%
- Actual Flows (MGD) = 0.019
- Actual + Permitted Obligated Flows (MGD) = 0.019

Grassy Branch

- Percent of Actual Flows = 76.0%
- Percent of Actual + Permitted Flows = 78.0%
- Actual Flows (MGD) = 0.038
- Actual + Permitted Obligated Flows (MGD) = 0.039

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 April 2026 are summarized in the attached tables.

FINANCIAL IMPACT:

None

Business

26-268 **America 250 Update**

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive information on America 250 related events and programs in Union County.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County is proud to celebrate the 250th anniversary of the signing of the Declaration of Independence on July 4, 2026, a defining moment in our nation's history. This upcoming milestone provides an opportunity to reflect on our country's founding principles and honor the progress and resilience of our community. This presentation includes an overview of various events, programs, and special projects related to America 250. Information continues to be shared across various platforms, with our website being our central location for sharing America 250 information: http://unioncountync.gov/america250

FINANCIAL IMPACT:

None.

26-284 **Drought Update - Stage 2**

INFORMATION CONTACT:

Aubrey Lofton, Union County Water, Director - Planning & Resource

Management, 704-296-4241

ACTION REQUESTED:

None.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Water is moving to Stage 2 Drought Restrictions on May 15. Staff will update the Board about the latest drought conditions, what customers can expect with the new restrictions, as well as resources to get additional information.

FINANCIAL IMPACT:

None.

26-188 Marshville Bypass Tolling Proposal

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

1) January 19, 2021, Regular Meeting, Agenda Item # 21 - Requesting tolling study and submittal for evaluation in 2050 Metropolitan Transportation Plan

2) February 3, 2025, Regular Meeting, Agenda Item # 25-044 - Submittal for evaluation in 2055 Metropolitan Transportation Plan

BACKGROUND:

The Marshville Bypass is a proposed four-lane median divided highway that would effectively extend the Monroe Expressway System by 5.1 miles from the current eastern terminus of the Monroe Expressway with a new location bypass south of Marshville, although the specific route would be determined through a full design process once funded. The project would have one intermediate interchange with Landsford Road south of Hasty Road and re-connect with U.S. 74 between Stegall Road and Gaddy Road.

The bypass has been submitted for funding through the two most recent Charlotte Regional Transportation Planning Organization (CRTPO) Metropolitan Transportation Plans (MTP), with it not scoring high enough for inclusion. In 2021 Union County and Marshville passed resolutions asking it to be studied as a possible tolled project. The NCDOT and NC Turnpike completed its work in January 2026, with the conclusion that by considering the bypass a part of the Monroe Expressway and extending the tolling on the bypass and Expressway for approximately 16 years, approximately ¾ of the estimated $287 million cost could be paid for by tolls. The remaining cost would need to be funded through the traditional Statewide Transportation Improvement Program (STIP) process. The

Town of Marshville evaluated this proposal at its May 4 meeting.

FINANCIAL IMPACT:

None.

26-242 **Appointments to Boards and Committees**

INFORMATION CONTACT:

Lynn G. West, Clerk to the Board of Commissioners, 704-283-3853;
Janet Payne, Human Services Agency, Executive Director, 704-296-4348

ACTION REQUESTED:

Appointment of members to fill vacancies.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Vacancies exist on the following Boards and/or Committees:

Juvenile Crime Prevention Committee (JCPC)

Appointments needed - 6 total as follows:

- One Representative from United Way/Other Nonprofit
- One Member of Faith Community
- One Juvenile Defense Attorney
- Two Commissioner Appointees
- One Parks & Recreation Representative

Applications received as follows:

- John Kirkpatrick - Member of Faith Community (currently serving and is seeking reappointment)
- Angela Watkins - Juvenile Defense Attorney (currently serving and is seeking reappointment)
- James Johnson Jr. - County Commissioner Appointee (currently serving and is seeking reappointment)
- Natasha Stoval - County Commissioner Appointee (currently serving and is seeking reappointment)
- Jim Chaffin - Parks and Recreation Representative (currently serving and is seeking reappointment)
- Delan Fulgham - United Way/Other Nonprofit (This is a new applicant who is seeking appointment representing United Way/Other Nonprofit.)

Land Use Board

Appointments needed - 3 Regular Members

Applications received as follows:

- Richard Davis - seeking reappointment
- Charles Darren Greene - seeking reappointment

- Andrew Medlin - seeking reappointment
- Jeffrey Clark
- Yash Shah

South Piedmont Community College Board of Trustees
Appointment needed - 1 Member
Applications received as follows:

- Julie Thompson
- Denise White
- David Williams

Centralina Workforce Development Board
Appointment needed - 1 Member for Vocational Rehabilitation Representative
Application received as follows:

- Natalie Ward

Consolidated Human Services Board
The Consolidated Human Services Board (CHSB), pursuant to N.C. general statute 153A-77, is permitted to be composed of up to 25 members and composition of the board shall reasonably reflect the population makeup of the County. Currently, the Union County CHSB has 19 membership positions, each of which has a specific designation. Ten positions are filled and there are 9 vacancies including:

- Consumer of Human Services (4)
- Dentist (1)
- Other Person (1)
- Pharmacist (1)
- Physician-Psychiatrist (1)
- Registered Nurse (1)

As is the County's usual practice, the vacancies available for appointment were advertised by posting a notice on the County's website: <https://www.unioncountync.gov/government/boards-committees/boards-committees>

At its March 9, 2026 meeting, the CHSB reviewed applications and voted unanimously to recommend that the Board of County Commissioners reappoint the following people to the CHSB:

- Ms. Amy Dickey is eligible for reappointment to fill the "Consumer of Human Services" position. Ms. Dickey is currently serving as the 2026 CHSB Chair.

- Ms. Brandi Smith is eligible for reappointment to fill the “Other Person” position. Ms. Smith is currently serving as the 2026 CHSB Vice-Chair.

Copies of the recommended applications are included for the BoCC’s review and consideration.

FINANCIAL IMPACT:

For CHSB: Up to $200 per year per member ($20 meeting x 10 meetings per year).

County Manager's Comments

Commissioners' Comments

Adjournment

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

File #: 26-287 **Agenda Date:** 5/18/2026

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. 153A-98; and
2) pursuant to G.S. 143-318.11(a)(3), to consult with an attorney in order to preserve the attorney-client privilege; and
3) pursuant to G.S. 143-318.11(a)(6), to consider the qualifications, competence, performance, character, fitness, conditions of appointment, or conditions of initial employment of an individual public officer or employee or prospective public officer or employee; or to hear or investigate a complaint, charge, or grievance by or against an individual public officer or employee.

FINANCIAL IMPACT:

None.

File #: 26-270 **Agenda Date:** 5/18/2026

TITLE:

Public Hearing - Rezoning Petition CZ-2026-001 Marcham

INFORMATION CONTACT:

John Wear, Planning Department, Senior Planner - Current Planning, 704-283-3605

ACTION REQUESTED:

Conduct public hearing for proposed rezoning.

PRIOR BOARD ACTION:

None.

BACKGROUND:

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

1) Limited to approved site plan dated April 7, 2026
2) Uses limited to landscaping supply business and construction equipment storage
3) Five-year vesting of development rights
4) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval
5) Access may be restricted to right in right out in the future, at the discretion of the NCDOT, based on safety issues that may be created by this site

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

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

If the Board of Commissioners wishes to make a decision on the rezoning petition, it 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-2026-001; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

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

General Information

Project Address 4521 waxhaw Hwy City Monroe State NC Zip 28112

Tax Parcel ID 09414019A Current Zoning Designation RA-40 Total Acres 5

Proposed Zoning Designation Light Industrial Date Submitted 1/12/2026

Contact Information

Applicant Name Tom marcham

Address 2904 McNeely Farms Dr City Wax Haw State NC Zip 28173

Phone 847-302-8577 Fax _____ Email [redacted]

Property Owner Name Tom Marcham

Address 2904 Mcneely Farms Dr City waxhaw State NC Zip 28173

Phone 847-302-8577 Fax _____ Email [redacted]

Applicant's Certification

Signature _____ Date 11/15/25 Printed Name/Title Tom Marcham

Owner's Certification (include names and signatures of all owners)

Signature _____ Date 11/15/25 Printed Name/Title Tom Marcham

Union County Office Use Only:

Case Number: 2026-CZ-001 Date Received: 1-12-26

Amount of Fee: $1000 Fee Ok: BCA Received by: BCA

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

UNIONCOUNTY north carolina

***This document is only valid from July 1, 2025 - June 30, 2026

Dear Union County Zoning Department,

January 2, 2026

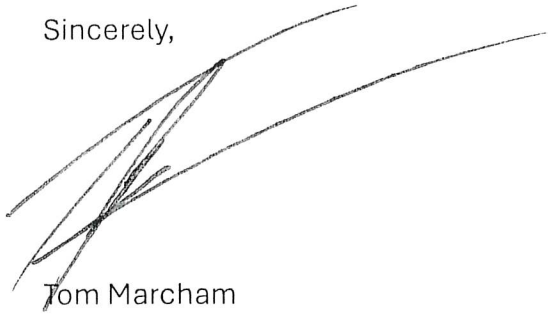
My name is Tom Marcham, I am writing to introduce myself. My son Stone and I own and operate Stone Pro Grading LLC. We are currently based in Waxhaw, North Carolina, and operate as a small grading and excavating company serving Union County and the greater Charlotte area.

We have recently purchased the property located at 4521 Waxhaw Highway, in unincorporated Union County with a Monroe mailing address. We are seeking to relocate our business operations to this site. In addition to headquartering Stone Pro Grading LLC, we are also proposing to open Stone Pro Material Sales. This business would operate as a wholesale and retail material yard offering mulch, stone, rock, sand, black soil, and other landscape materials to both contractors and the general public.

We believe this proposed use would be a good fit for the property and a beneficial addition to the surrounding area. This would not be a large-scale operation. The material yard would employ four to six people. It would be designed as a low-impact facility. We will make the property visually appealing through the use of a gated entrance, professional landscaping, and decorative berms.

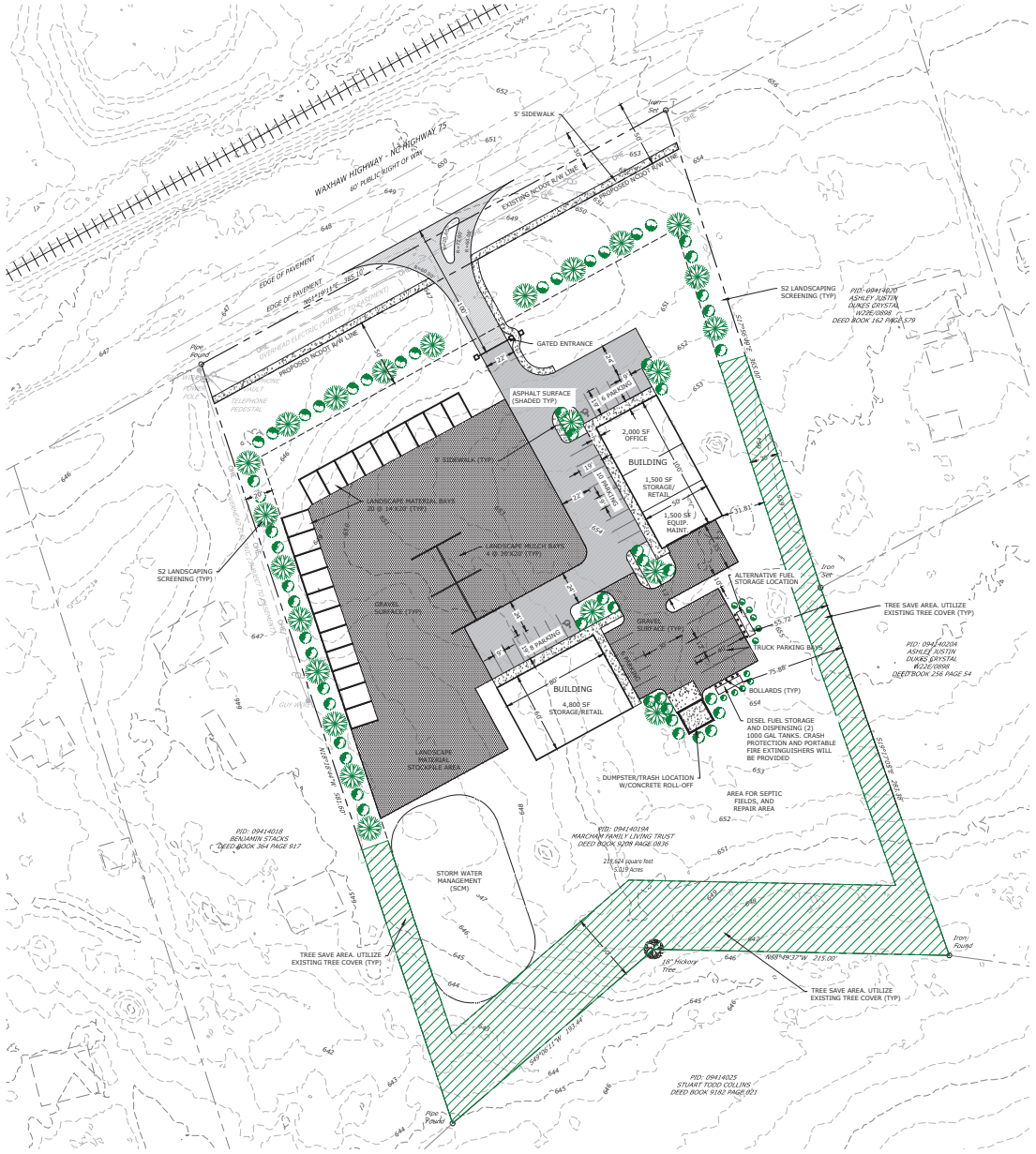
Accordingly, we are requesting that the property be rezoned from Residential RA-40 to Light Industrial zoning to accommodate this proposed use.

Sincerely,



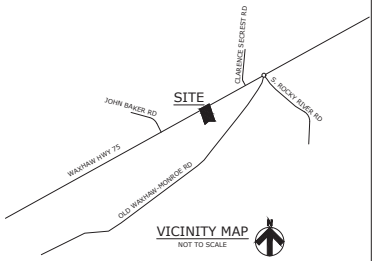
Tom Marcham

Stone Pro Grading LLC



GENERAL NOTES / CONDITIONS OF APPROVAL:

1. LIMITED TO APPROVED SITE PLAN DATED APRIL 7, 2026
2. USES LIMITED TO LANDSCAPING SUPPLY BUSINESS AND SITE WORK CONSTRUCTION EQUIPMENT STORAGE.
3. OUTDOOR RETAIL STORAGE WILL BE UTILIZED.
4. PARKING IS PROVIDED FOR TRUCKS AND EQUIPMENT AS SHOWN.
5. DIESEL FUEL STORAGE AND DISPENSING TANKS PROVIDED AS SHOWN ON PLAN.
6. THERE WILL BE NO CRUSHING, GRINDING, PULVERIZING OF MATERIALS ON SITE. SUPPLYING FINISHED PRODUCTS ONLY.
7. OUTDOOR LIGHTING WILL BE PROVIDED ON SITE AND WILL CONFORM TO UNION COUNTY STANDARDS. LOCATION AND TYPES OF LIGHTS WILL BE PROVIDED WITH THE CONSTRUCTION DOCUMENT SUBMITTALS.
8. 50' RIGHT OF WAY DEDICATION TO NCDOT WILL BE PROVIDED, AS MEASURED FROM THE CENTERLINE OF THE ROAD ALONG THE FRONTAGE FOR THIS SITE. PER DISCUSSIONS WITH NCDOT, ACCESS FROM NC 75 IS RIGHT IN AND RIGHT OUT TRAVELING EASTBOUND. WESTBOUND TRAFFIC WILL BE ALLOWED TO ACCESS SITE BY A LEFT TURN.
9. SEWER SERVICE SHALL BE BY SEPTIC SYSTEMS. THE APPROXIMATE AREA FOR THE PROPOSED SEPTIC FIELD IS SHOWN ON THIS PLAN.
10. WATER SERVICE SHALL BE PUBLIC WATER. CONNECTION WILL BE AT THE FRONTAGE ROW OF WAXHAW HIGHWAY.
11. THIS PLAN SHALL FULLY COMPLY WITH ALL PROVISIONS OF THE UNION COUNTY DEVELOPMENT ORDINANCE.
12. FIVE-YEAR VESTING OF DEVELOPMENT RIGHTS WILL BE ISSUED.



VICINITY MAP
NOT TO SCALE

DEVELOPMENT SUMMARY

OWNER:	MARCHAM FAMILY LIVING TRUST
DEVELOPER INFO:	STONE PRO GRADING, LLC
CONTACT:	THOMAS MARCHAM
EMAIL:	tmarcham@penskeautomotive.com
PHONE	847-302-8577

ENGINEER
POB ENGINEERING, PLLC
FRANK CANTRELL, 704-564-3824
frank.cantrell@pobengineering.com

SITE ADDRESS:	4521 WAXHAW HWY
GROSS SITE AREA:	5.02±
DISTURBED AREA:	3.4±
PARCEL No.:	09414019A
DEED BOOK / PAGE	9208/0836
EXISTING ZONING:	RA-40
EXISTING USE:	VACANT
PROPOSED ZONING	LI CZ
PROPOSED USE:	LANDSCAPE SUPPLIES

PARKING REQUIREMENTS		REQUIRED	PROVIDED
OFFICE - 1 SPACE PER 300 SF	2,000 SF/300 SF	7	
STORAGE/RETAIL - SPACE PER 400 SF	6,300 SF / 400 SF	16	
VEHICLE REPAIR AND MAINTENANCE	2 SP PER BAY	4	
TOTAL PARKING		27	30

PROPOSED HI ZONING

BUILDING SETBACKS REQUIRED	
FRONT	50'
SIDE	20'
REAR	50'
MAX. BUILDING HEIGHT	100'
PROPOSED STREETS: / PRIVATE DRIVES	AS SHOWN ON PLAN

S2 LANDSCAPE AREA

TREE SAVE AREA, EXISTING TREES TO BE UTILIZED

ASPHALT PAVING

GRAVEL AREAS

811 SAFETY IS IN YOUR HANDS. EVERY DIG. EVERY TIME.

POB Engineering
16439 Bastille Dr.
Fort Mill, SC 28278
704-564-3824
Frank.Cantrell@pobengineering.com

NORTH CAROLINA COL P-1888

NORTH CAROLINA PROFESSIONAL SEAL 039811 ENGINEER Frank Cantrell

CONCEPT PLAN
NOT FOR CONSTRUCTION

April 7, 2026

CONCEPT PLAN FOR REZONING APPLICATION

STONE PRO MATERIAL SALES

STONE PRO GRADING, LLC

MINERAL SPRINGS, UNION COUNTY, NORTH CAROLINA

DATE	DESCRIPTION	BY

DRAWN | FC
DESIGNED | FC
CHECKED | DC
PROJECT # | P250145

SHEET NUMBER

C-100

Plot Stamp: 4/7/2026 4:56:10 PM - F.Cantrell
File: Z:\Shared\Projects\Stone Pro\Mineral Springs\Civil\DWGS\01_Base&Sketch Plan\Stone Pro.dwg, Tab: Sketch Plan

THE DUGGAN LAW FIRM

PO Box 481
Monroe, NC 28111
Telephone (704) 776-9610
cduggan@dugganlegal.com

Christopher M. Duggan, Esq.
Licensed in North Carolina
and New York

April 6, 2026

Via Email bjorn.hansen@unioncountync.gov
Bjorn Hansen
Union County Planning Department
500 N. Main Street
Monroe, NC 28112

Re: Stone Pro Materials 4521 Waxhaw Highway Parcel ID: 09414019A

Dear Mr. Hansen

As you know a community meeting was held on March 30, 2026 at 6:00pm at the Mineral Springs Voluntary Fire department for the zoning change at the above referenced property from residential to light industrial. I am attaching a copy of the sign-up sheet for the meeting wherein six (6) residents appeared for the meeting. Also in attendance was Bjorn Hansen and John Wehr from Union County, the undersigned, the applicant representatives Tom Marcham and Stone Marcham, and Frank Cantrell, the engineer on the project.

The meeting was opened by the undersigned to provide a summary of the zoning change request and the intended use at the property. Mr. Tom Marcham addressed the residents to discuss the intended use of the property. Mr. Marcham advised the residents that the intended use was for landscaping supply material such as mulch, stone and black dirt bulk and retail sales. In addition, the applicant intends to have space available for the storage of landscaping equipment. The applicant advised the residents that the use did not contemplate any grinding or general dumping of material, other than material delivery. This representation was welcomed news to the residents as there was a concern that there would be grinding of material on the property. A question was raised as to why the applicant did not purchase a property already zoned light industrial. The applicant advised that there was not property that would fit the desired use but that the subject property was in the anticipated employment corridor of the County Land Use Plan.

One resident inquired as to whether the property would be fenced along the parameter of the property. The applicant advised that, along with the required S2 screening that will be along the property, the property would indeed be fenced along the parameter. Questions were also raised regarding dust generated from the property. The applicant advised that the retail and parking area would be paved and the area where the bulk material will be stored will have stone surface but that they will have a water truck present to make sure that the amount of dust generated from the machines would be limited. There was also a concern raised about hours of operation and lighting. The applicant advised that the intended hours of operation would be Monday-Friday 7:30am to 5:00pm and Saturday from 7:30am to 1:00pm or potentially open later based upon market conditions. Sunday open to public based upon market conditions. In all cases 5:00pm will be the latest time to be open. Regarding the lighting, there would be some security lights on the property/building that would be down

facing and motion activated. The height of the stand-alone lights is anticipated to be approximately 10'-12'. However, because the property will be secured by a gate, it is anticipated that the amount of security lighting will be limited. Residents were advised that a photometric study will be required by the County. Questions were raised about water runoff and the engineer on the project advised the residents regarding the anticipated dry retention pond will be installed to limit the amount of water runoff from the site. The residents were informed that the site will be serviced by County water and onsite septic, which will be maintained. Finally, the residents were informed that the access to the property will be right in and right out, with a left turn available for traffic traveling west on Hwy 75.

The general overall sentiment of the residents in attendance was positive. They represented that the intended use would have a low impact on the neighboring properties and the intended use would be preferable to a more intense commercial use or a housing development. The comment was made that the County needs more low impact commercial uses similar to the use proposed by the applicant. The residents therefore seemed to approval of the zoning change as represented by the applicant.

While approval would come with a 2-year vesting period, the applicant also requests the additional five 5 years for vesting.

Should you have any questions, please do not hesitate to contact me.

Very truly yours,

Christopher M. Duggan, Esq.

CMD:st
Enc.

Stone Pro Material Sales
Community Meeting
March 30, 2026

Sign-in Sheet

Print Name	Address	E-mail
Frank Cantrell		Frank@pdoengineering.com
Judy Simpson	4420 Old Waxhaw Monroe Rd.	
DAVID B. CONLEY	1518 CLARENCE SECREST RD MONROE, NC 28110	DAVIS@HARTWICK.EDU
Erich D. Helms	3.27 acres Old Waxhaw Monroe Rd.	
Bjorn Hansen	500 N. Main St	bjorn.hansen@unioncountync.gov
John Wear	500 N. Main St.	john.wear@unioncountync.gov
Richard Ashley	4513 Waxhaw Hwy.	rashley4@carolina.rr.com
Kathy & Ed Davis	4513 Waxhaw Hwy.	eddavis569@gmail.com
		kadavis31@gmail.com

Rezoning Request CZ-2026-001 Marcham

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

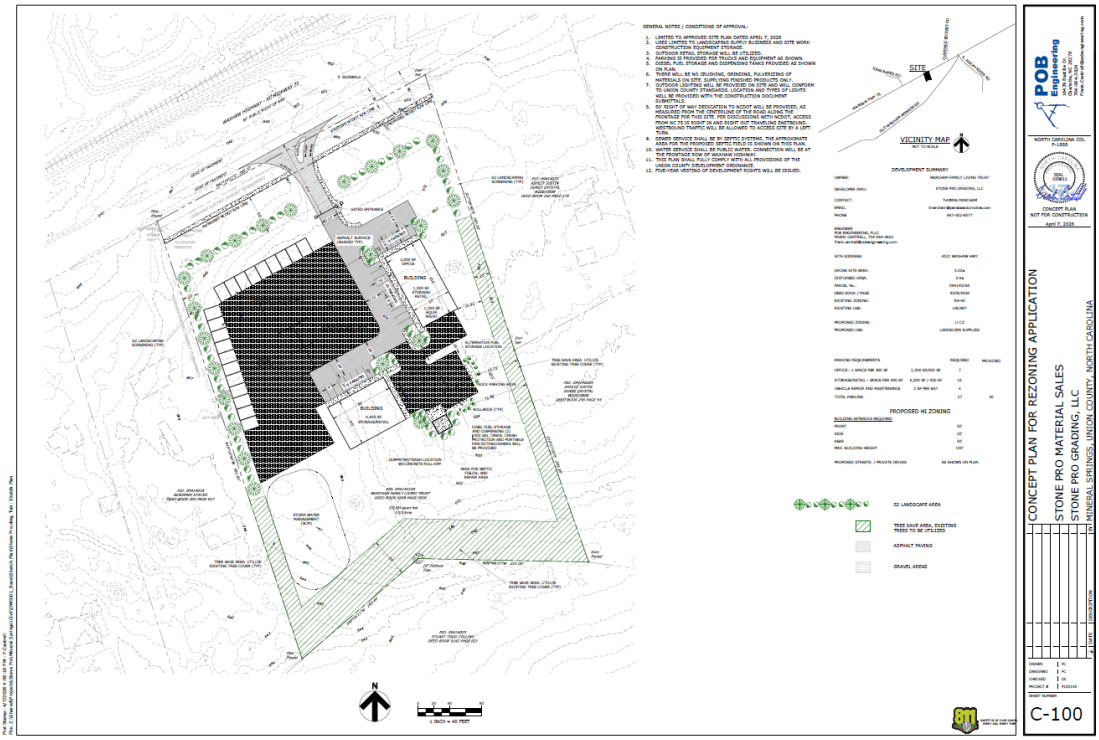
1) Limited to approved site plan dated March 6, 2026

2) Uses limited to landscaping supply business and construction equipment storage

3) Five-year vesting of development rights

4) Development will meet all requirements of the Union County Unified Development Ordinance on the date of approval

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



Planning Department
500 North Main Street, Suite 70
Monroe, NC 28112
T 704.283.3565

unioncountync.gov

Contact Information

1. Staff: John Wear, Senior Planner, 704-283-3605, john.wear@unioncountync.gov
2. Owner: Marcham Family Living Trust, 2904 McNeely Farms Drive, Waxhaw, NC 28173
3. Applicant: Thomas Marcham, 2904 McNeely Farms Drive, Waxhaw, NC 28173

Property Information

Located on the south side of NC 75 west of Rocky River Road. Location more specifically described as tax parcel 09-414-019A.



Site



North of Site



West of Site



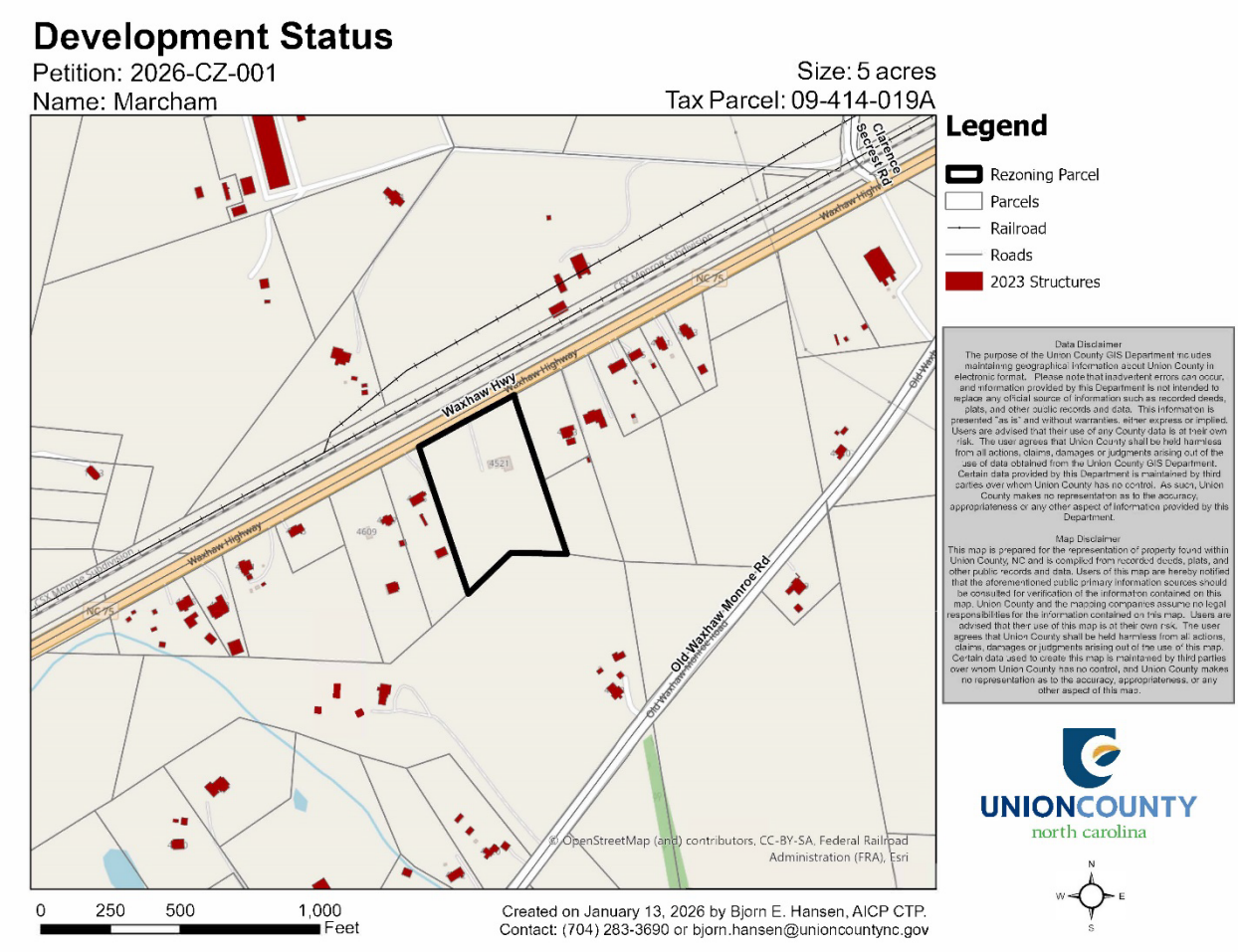
East of Site

Municipal Proximity

The site is approximately 2/3 of a mile east of Mineral Springs.

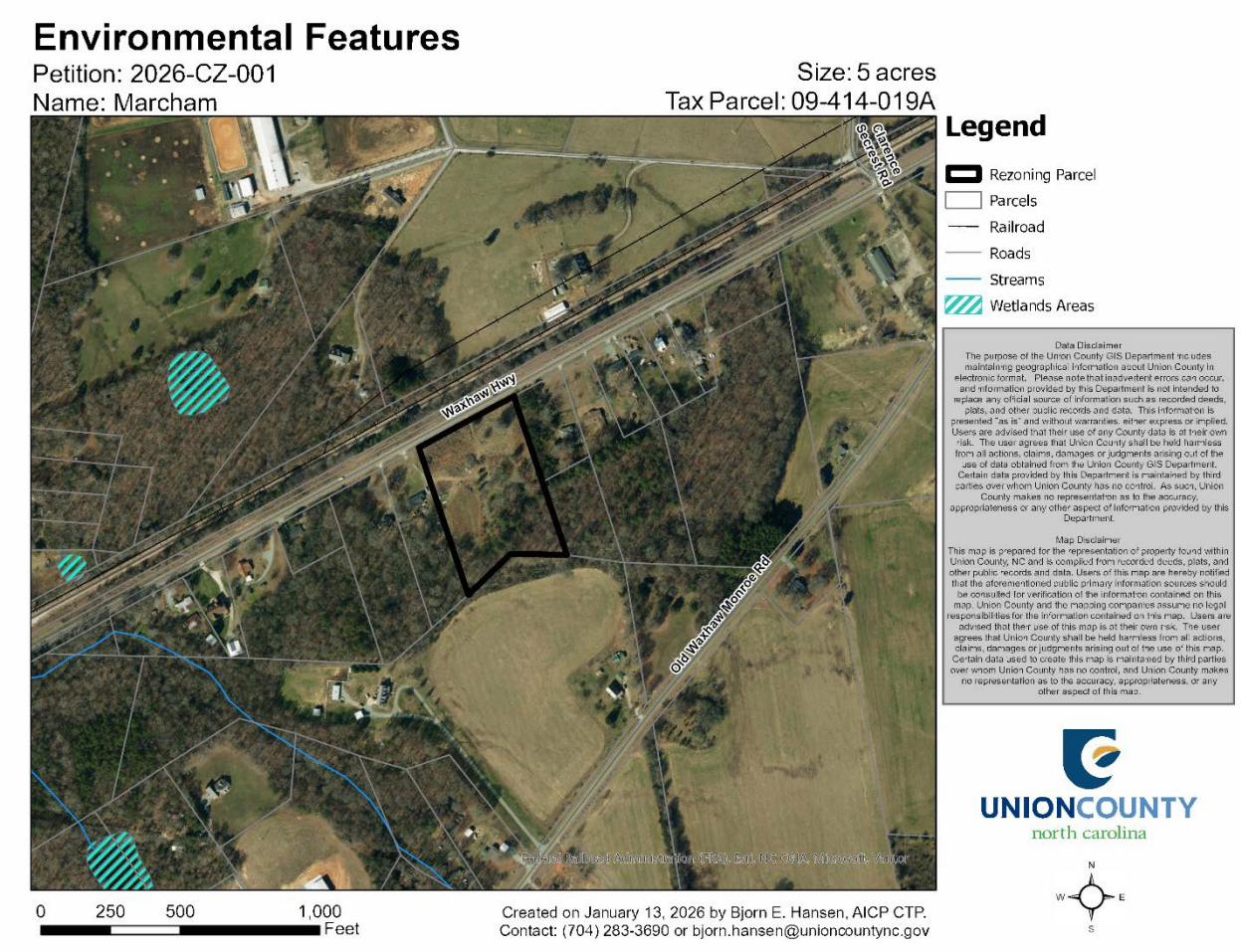
Existing Land Use and Development Status

The parcel is currently zoned RA-40 and is partially cleared. A single-family home was removed approximately six years ago.



Environmental Features

There is a stream on the northern edge of the site that is incorporated into the stormwater pond. There are no other environmental features.

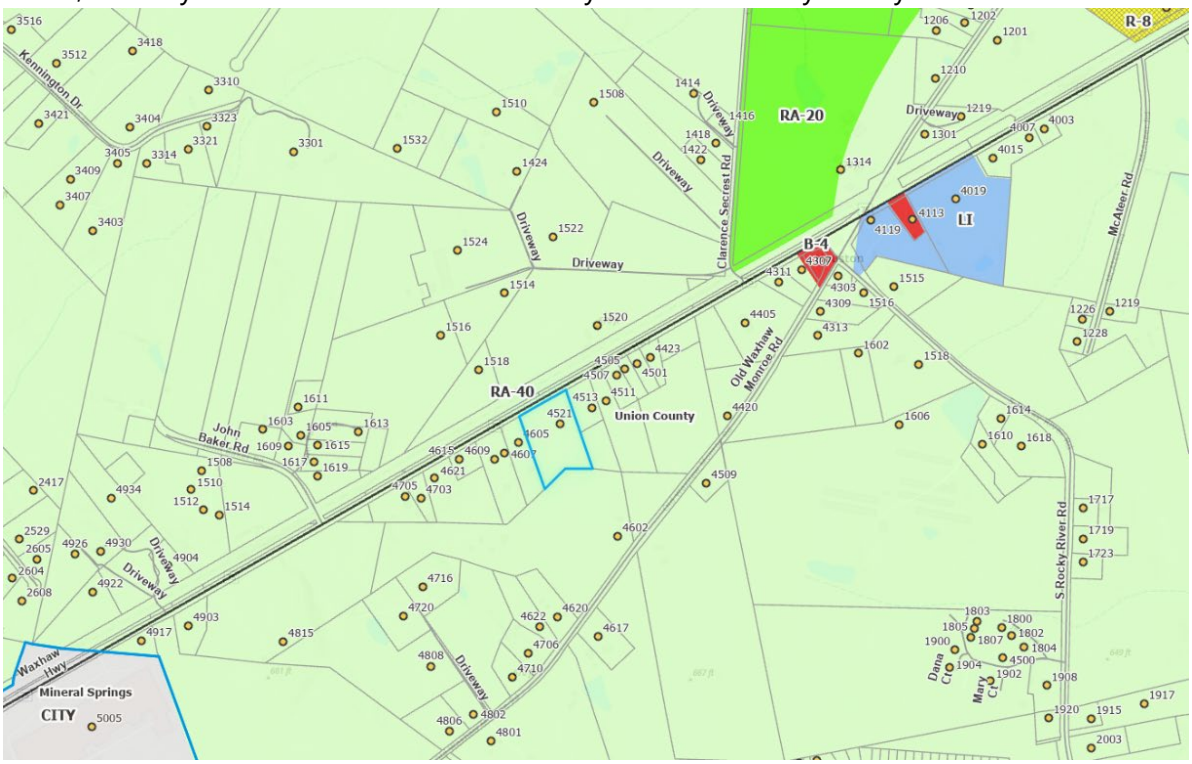


Utilities

Public water is available to the site. The site will use septic service and an area is shown on the site plan.

Zoning and Land Use History

The parcel site has been zoned RA-40 since zoning was instituted. There have been three proposed residential rezonings for higher density development within a half mile of the site since 2019. All three were denied. Three commercial or industrial rezonings were approved at the intersection of Rocky River and NC 75 between 1977 and 2013. Several special use permits have been approved at the intersection of Rocky River and NC 75 for a telecommunications tower, two daycares and for the Union County Humane Society facility.

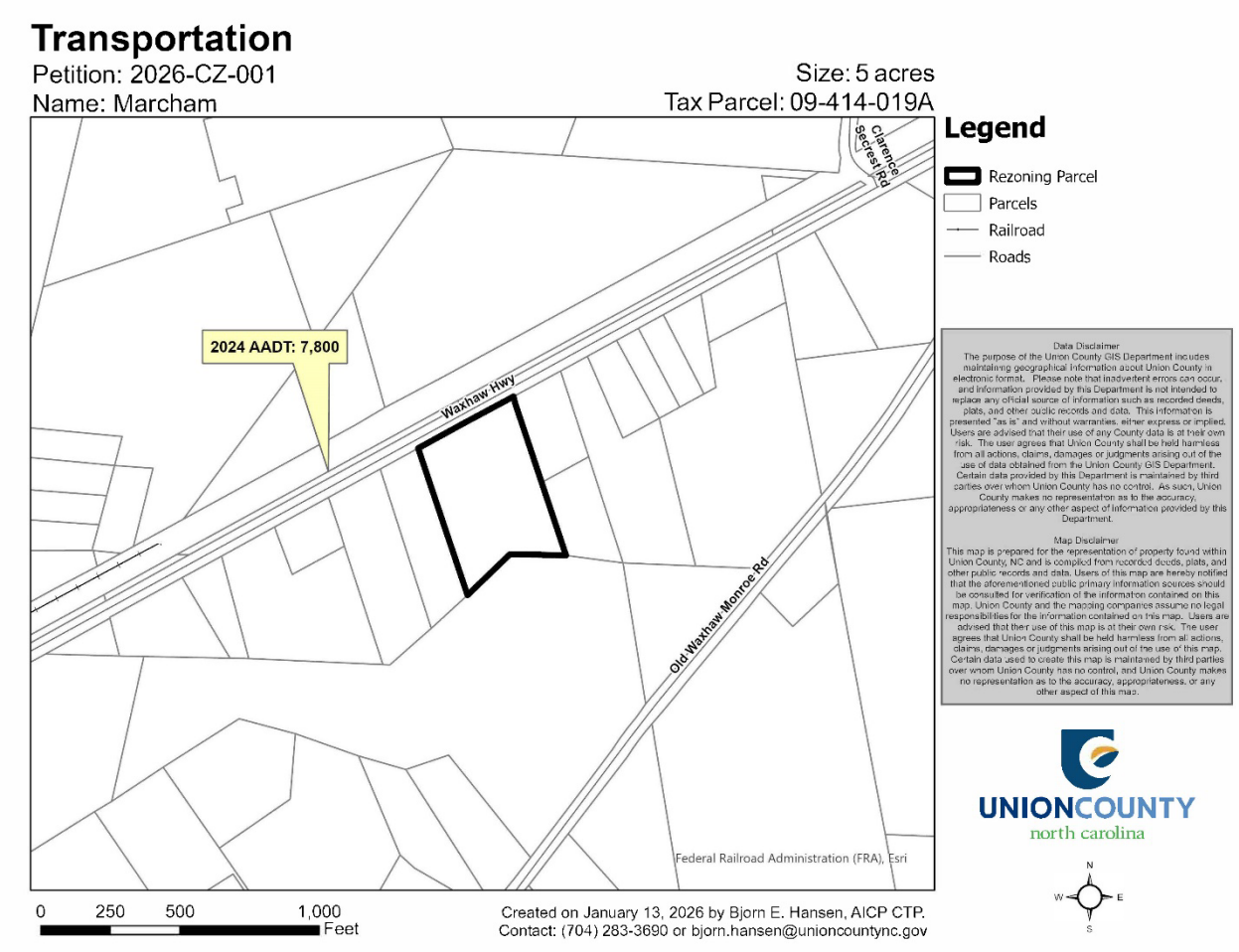


Schools

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

Transportation

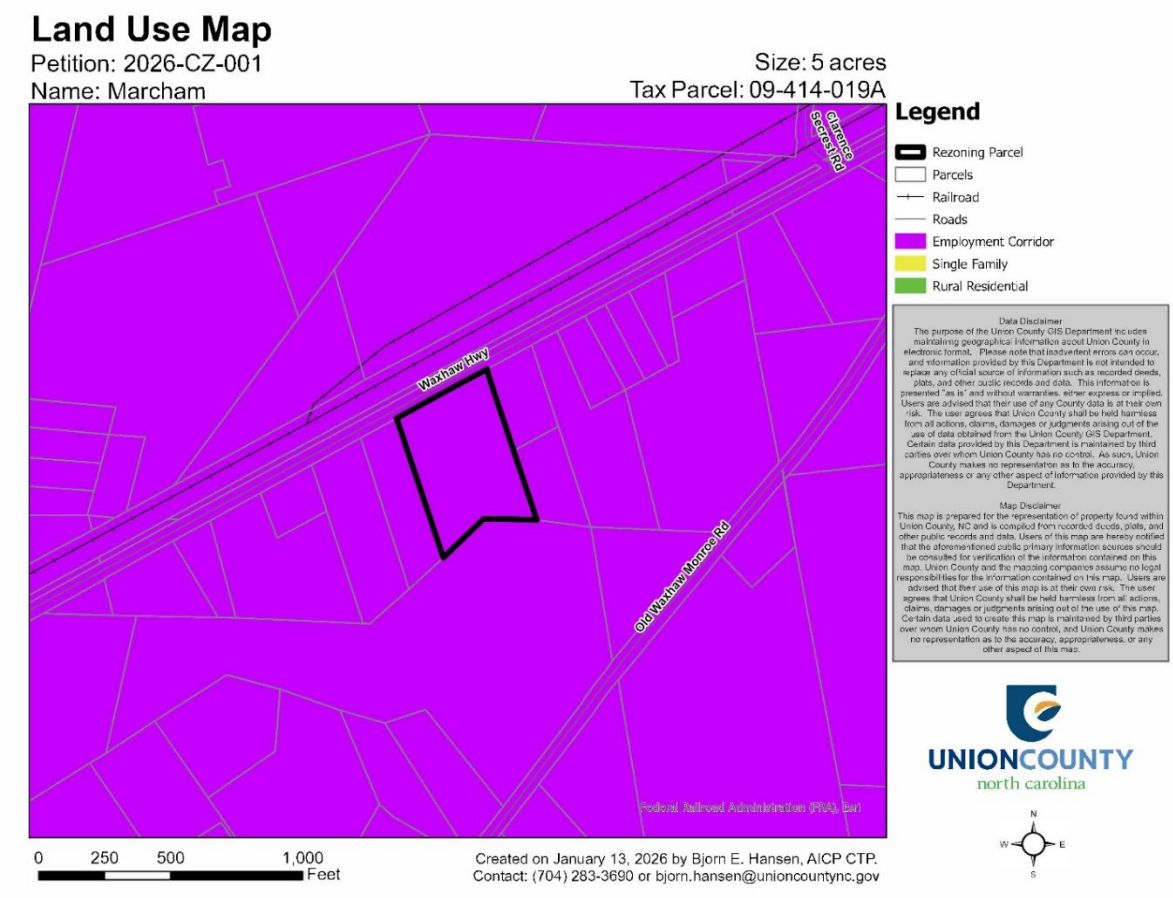
This parcel is on NC 75, which is a NCDOT-maintained facility. NC 75 carries approximately 7,800 vehicles per day. The proposed use would have a low traffic impact but would have a high percentage of trucks and vehicles with trailers. Because of these concerns, the access from the site is limited to right outs, with these vehicles wanting to travel west to use the roundabout at Rocky River Road. There are no funded road improvement projects in the immediate vicinity of the rezoning. A Traffic Impact Analysis was not required for this rezoning.



Union County Comprehensive Plan

The Union County 2050 comprehensive plan identifies this area as a Rural Residential area with an Employment Corridor Overlay. The uses proposed under Light Industrial zoning require a special use permit, which can be incorporated into the rezoning. The applicant has stated in their application, submitted documentation or staff have concluded through a site plan review that it meets the five findings of fact necessary for a special use permit:

1. The proposed use and development comply with all regulations and standards generally applicable within the zoning district and specifically applicable to the particular type of special use.
2. The proposed development will not materially endanger the public health or safety.
3. The proposed development will not substantially injure the value of abutting property, or is a public necessity.
4. The proposed development will be in harmony with the area in which it is located.
5. The proposed development will be in general conformity with the comprehensive plan.



Public and Municipal Comments

Public Comments

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

Municipal Comments

Mineral Springs was contacted and responded that they did not have any issues with the proposed rezoning.

Recommendations

Land Use Board

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

Planning Department

This part of Union County is identified as an Employment Corridor overlaid on rural residential and agricultural land uses. The proposed use is allowed in Light Industrial with a Special Use Permit, which the applicant had stated they meet the conditions for such a permit, and Light Industrial is an appropriate zoning designation in an Employment Corridor. The proposed traffic impacts are moderate and have been mitigated in the site plan and this use will provide options to residents in the area and increase business opportunities in Union County. The proposed use is therefore considered appropriate for the area. Because of these aspects of the development, staff recommend **approval** of this rezoning application.

From:	Marcham,Tom
To:	Bjorn Hansen
Cc:	Frank Cantrell; cduggan dugganlegal.com
Subject:	Stone Pro Material sales/4521 Waxhaw Hwy,
Date:	Friday, April 3, 2026 3:03:18 PM

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Bjorn,

We understand if we are approved for the requested zoning change to Light Industrial zoning at our property located at 4521 Waxhaw Hwy , Monroe NC we would have a 2 Year vesting period to start our project, however we are asking to have this extended to a 5-year vesting period . Thanks for your consideration, we look forward to working with you..

Thomas Marcham
General Manager
Mercedes Benz of South Charlotte
704-889-4444
Tmarcham@penskeautomotive.com



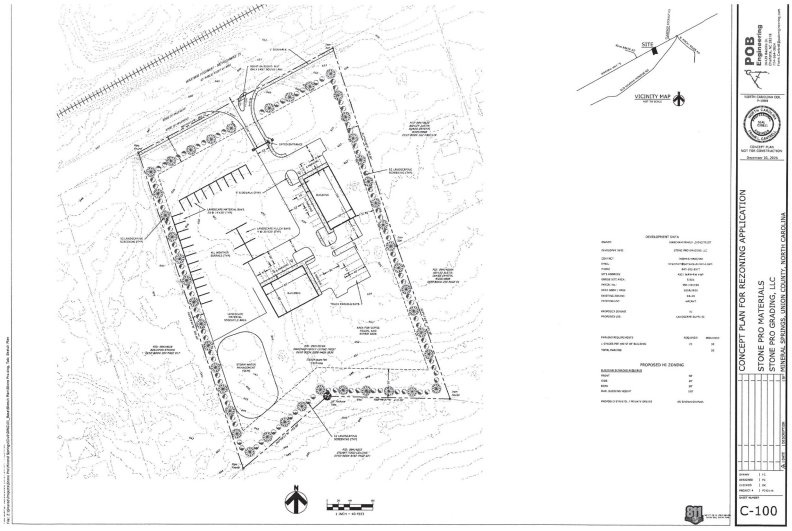
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Morrison Appraisal, Inc.
Providing Exceptional Value since 1985

Impact Study
4521 Waxhaw Highway
Parcel ID: 09414019A
Monroe, North Carolina



As of
February 9, 2026

Prepared For
Chris Duggan
The Duggan Law Firm, PC
101 S. Main Street
Monroe, NC 28112

Prepared by
MORRISON APPRAISAL, INC
Andrew Morrison, MAI, CCIM,
North Carolina Certified General-A7253

Morrison Appraisal, Inc.
Providing Exceptional Value since 1985

613 Euclid Street · Monroe, NC
704-283-2286 office · 704-283-8989 fax
morrisonappraisal@carolina.rr.com

March 25, 2026

Christopher Duggan, Esq.
The Duggan Law Firm, PC
101 S. Main Street
Monroe, NC 28112

Re: Impact Study
4521 Waxhaw Highway
Parcel ID: 09414019A
Monroe, North Carolina

Dear Mr. Duggan:

At your request, I have completed an impact study concerning the proposed conditional rezoning of the above-referenced property, which includes a request to rezone the property from RA-40 (Residential Agricultural) to Light Industrial, along with a Special Use Permit to allow for outdoor storage. This analysis was conducted to assist in evaluating whether the proposed rezoning is expected to substantially injure the value of abutting properties.

The subject property consists of approximately 5.00 acres located along Waxhaw Highway in Union County, North Carolina. The property is currently vacant and situated within a predominantly rural area characterized by a mix of residential, agricultural, and infrastructure-related land uses.

The scope of this assignment included an analysis of market data, comparable property conditions, and case studies involving residential properties located in proximity to light industrial and contractor-oriented uses. The purpose of this analysis was to determine whether the proposed use would be expected to result in a measurable and material reduction in the value or marketability of surrounding residential properties.

Morrison Appraisal, Inc.
Providing Exceptional Value since 1985

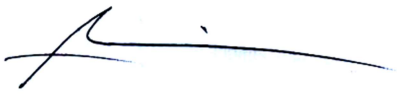
613 Euclid Street · Monroe, NC
704-283-2286 office · 704-283-8989 fax
morrisonappraisal@carolina.rr.com

Based on the analysis contained within the accompanying report, it is my opinion that the proposed rezoning and associated site plan are not expected to result in a measurable or consistent reduction in the value of surrounding properties. Accordingly, the available market evidence does not support a conclusion that the proposed use would substantially injure the value of abutting properties.

This analysis has been prepared in accordance with the Uniform Standards of Professional Appraisal Practice (USPAP) and is subject to the assumptions and limiting conditions contained within the report.

Thank you for the opportunity to be of service. Please feel free to contact me with any questions or if additional analysis is required.

Andrew G. Morrison, MAI, CCIM



Morrison Appraisal, Inc.
Providing Exceptional Value since 1985

613 Euclid Street · Monroe, NC
704-283-2286 office · 704-283-8989 fax
morrisonappraisal@carolina.rr.com

Subject Property – 4521 Waxhaw Highway

All photographs were taken at the time of inspection and are representative of site conditions.


Site Frontage along Waxhaw Highway


Highway View – Westbound Direction


Interior of Site – North View


Rear of Site – South View


View from Rear Toward Waxhaw Highway


Adjoining Property – West Boundary

613 Euclid Street · Monroe, NC
704-283-2286 office · 704-283-8989 fax
morrisonappraisal@carolina.rr.com

IMPORTANT FACTS AND CONCLUSIONS

Property Location	4521 Waxhaw Highway, Union County, NC
Parcel ID	09414019A
Property Owner	Marcham Family Living Trust
Study Requested By	Christopher Duggan, Esq., The Duggan Law Firm, PC
Intended Use	To assist the client in evaluating the potential impact of a proposed rezoning on surrounding properties
Intended User	Christopher Duggan and associated parties involved in the rezoning process
Date of Study	March 9, 2026
Property Rights Considered	Fee Simple
Current Zoning	RA-40 (Residential Agricultural)
Proposed Zoning	Light Industrial (Conditional Rezoning) with Special Use Permit for outdoor storage
Site Area	Approximately 5.00 acres
Current Use	Vacant land
Proposed Use	Light industrial use with associated outdoor storage, as depicted in the submitted site plan
Scope of Analysis	Analysis of market data, comparable property conditions, and case studies to evaluate whether the proposed use is expected to result in a measurable and material impact on surrounding property values
Extraordinary Assumptions	The proposed development will be constructed in substantial accordance with the submitted site plan
Hypothetical Conditions	None
Conclusion	Based on observed market behavior and analysis of comparable conditions, the proposed rezoning and associated use are not expected to result in a measurable or consistent reduction in the value or marketability of surrounding properties, and therefore are not expected to substantially injure the value of abutting properties

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PURPOSE AND SCOPE OF WORK

Purpose of the Study

The purpose of this analysis is to evaluate whether the proposed conditional rezoning of the subject property, including a Light Industrial classification and associated Special Use Permit for outdoor storage, is likely to result in a measurable and material reduction in the value or marketability of surrounding residential properties.

This study is specifically intended to assist the client in determining whether the proposed use would be expected to "substantially injure" the value of abutting properties, as required in the rezoning review process.

Intended Use and Intended User

The intended use of this report is to provide market-based analysis and support for consideration in the rezoning process.

The intended user of this report is Christopher Duggan, Esq., and associated parties involved in the evaluation of the proposed rezoning. No other use or user is intended or authorized.

Scope of Work

The scope of work for this assignment included the collection, analysis, and interpretation of market data relevant to residential properties located in proximity to light industrial, contractor-oriented, or similar non-residential uses.

The analysis included a review of comparable market conditions, transaction data, and case study examples in which residential properties are situated near similar uses. Key indicators considered include sale price, price relationships, and general marketability characteristics, including relative positioning within the market and exposure time.

In addition, the subject property and surrounding area were analyzed with respect to land use patterns, site characteristics, and the proposed development layout, including buffering, access, and overall site design as depicted in the submitted site plan.

This assignment does not include the development of an opinion of market value for the subject property or any surrounding properties. Rather, the analysis is limited to evaluating whether a measurable and consistent pattern of impact is evident in the marketplace.

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Nature of the Assignment

This study is an analysis of market behavior and is not intended to be an appraisal, appraisal review, or appraisal consulting assignment as defined by the Uniform Standards of Professional Appraisal Practice (USPAP). No opinion of market value is developed as part of this assignment.

The conclusions presented herein are based on observed market data and are intended to reflect the behavior of typical market participants under similar conditions.

Assumptions and Limiting Conditions

This analysis assumes that the proposed development will be constructed in substantial accordance with the submitted site plan and applicable zoning conditions.

The analysis is based on information available as of the date of this report and assumes that no significant changes in market conditions or regulatory requirements occur that would materially alter the conclusions

PROPERTY DESCRIPTION AND SITE CONTEXT

Property Description

The subject property is located at 4521 Waxhaw Highway in Union County, North Carolina, and is identified as Parcel ID 09414019A. The site consists of approximately 5.00 acres and is currently vacant, with a prior residential improvement having been removed.

The property is generally rectangular in shape and features frontage along Waxhaw Highway, a primary transportation corridor within the area. Based on site inspection and available mapping, the topography appears generally level to gently sloping and suitable for development. The site is primarily wooded, with natural vegetation providing existing screening along portions of the perimeter.

Access to the property is proposed via Waxhaw Highway. According to the client's conversations with NCDOT and minimal traffic impacts, NCDOT is not requiring a left turn lane into property.

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Subject Property Summary

Attribute	Description
Location	4521 Waxhaw Highway, Union County, NC
Parcel ID	09414019A
Site Area	±5.00 acres
Current Use	Vacant land
Prior Use	Residential (demolished)
Current Zoning	RA-40 (Residential Agricultural)
Proposed Zoning	Light Industrial (Conditional)
Proposed Use	Light industrial with outdoor storage
Access	Waxhaw Highway
Topography	Generally level to gently sloping
Vegetation	Primarily wooded with natural buffering

Proposed Development

The proposed development consists of a light industrial use with associated outdoor storage areas, subject to conditional rezoning and a Special Use Permit.

Based on the conceptual site plan provided, the development is designed with a centrally located building footprint, surrounded by internal circulation and designated parking areas. Outdoor storage areas appear to be located within the interior of the site and are not positioned directly along the roadway frontage.

The plan indicates the use of perimeter buffering, including landscaped and wooded areas, intended to provide visual screening from adjoining properties. The overall layout reflects an effort to internalize operational components and minimize external visibility.

While the conceptual plan is preliminary in nature, it provides sufficient detail to evaluate the general layout, access, and relationship of the proposed use to surrounding properties.

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Proposed Development Overview

Feature	Description	Impact Relevance
Building Location	Centrally located on site	Reduces edge impact
Outdoor Storage	Located within interior of site	Limits visibility
Buffering	Perimeter landscaping and wooded areas	Provides visual screening
Access Design	Controlled ingress/egress	Minimizes traffic disruption
Site Size	5.00 acres	Allows separation from neighbors

Site and Locational Characteristics

The subject's location along Waxhaw Highway provides both visibility and accessibility, which are characteristics commonly associated with a range of land uses beyond strictly residential development.

The size of the parcel, combined with existing vegetation and the proposed buffering shown on the site plan, allows for separation between the proposed use and adjoining properties. This separation is an important consideration in evaluating potential external impacts.

Overall, the subject property is not located within a densely developed residential subdivision, but rather within a broader rural setting where a variety of land uses coexist.

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ZONING AND FUTURE LAND USE

Current Zoning

The subject property is currently zoned RA-40 (Residential Agricultural) by Union County.

This zoning classification is intended to support low-density residential development and agricultural uses, generally characterized by large lot sizes and rural land use patterns. While certain limited non-residential uses may be permitted within this district, light industrial uses and outdoor storage are not permitted by right and require rezoning and/or special approval.

As such, the proposed use cannot be developed under the current zoning designation.

Proposed Zoning

The proposed rezoning seeks to reclassify the subject property to a Light Industrial designation, along with a Special Use Permit to allow for outdoor storage.

The proposed use consists of a light industrial operation with associated outdoor storage areas, as depicted in the submitted conceptual site plan. This type of use is more intensive than those permitted under the current RA-40 zoning and therefore requires discretionary approval through the rezoning process.

Comprehensive Plan and Land Use Guidance

Union County has adopted long-range planning documents, including the Union County 2050 Comprehensive Plan and the Rural Land Use Plan, which provide guidance on future land use patterns and development policies.

The 2050 Comprehensive Plan identifies the importance of coordinating land use patterns with infrastructure and transportation corridors, noting that development along major roadways often reflects a broader range of uses and intensities .

Additionally, the Rural Land Use Plan emphasizes the preservation of rural character while recognizing ongoing development pressures and the need for flexibility in land use decisions .

These planning documents acknowledge that rural areas are subject to change over time, particularly along transportation corridors where access and visibility support a variety of land uses.

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Land Use Context and Compatibility

The subject property is located along Waxhaw Highway, a primary transportation corridor that introduces influences beyond purely residential use.

As illustrated in the accompanying exhibits, the surrounding area is characterized by a mix of:

- Low-density residential uses
- Agricultural and vacant land
- Existing infrastructure, including a railroad corridor

This pattern is consistent with a transitional rural corridor environment, where a range of land uses may coexist.

The Union County 2050 Plan specifically recognizes that land use maps provide general guidance and cannot fully capture site-specific conditions such as buffering, infrastructure, and design elements that influence compatibility .

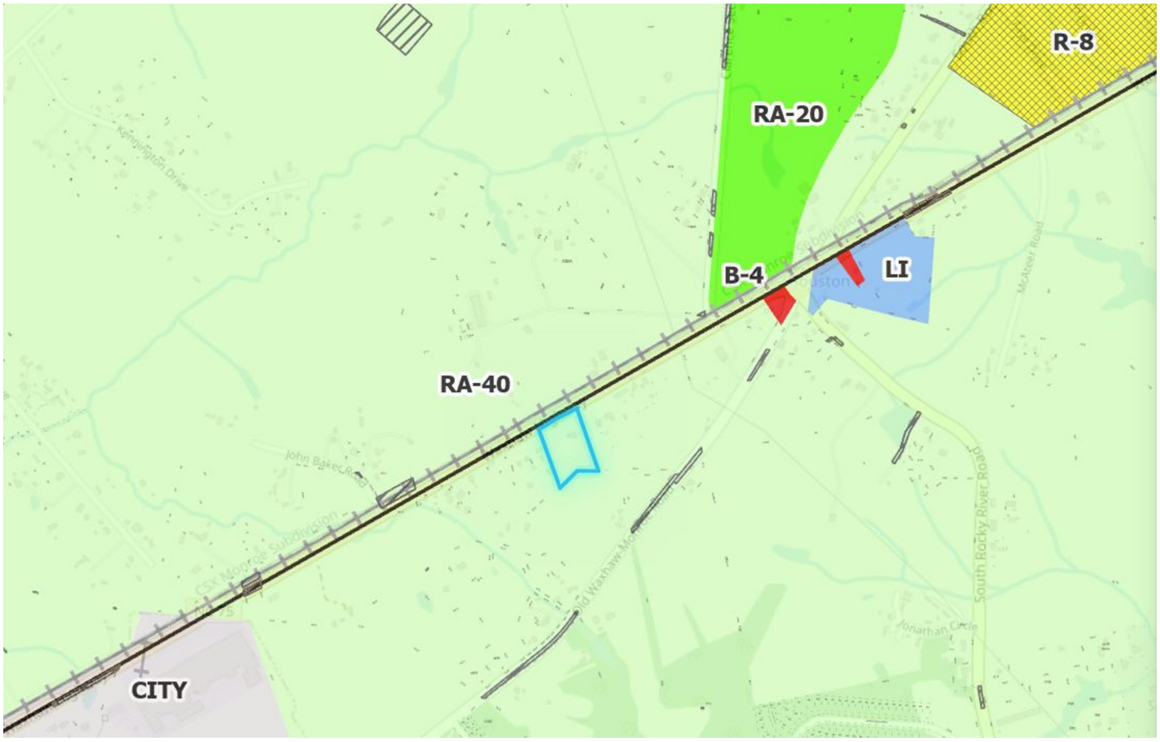
Accordingly, compatibility is evaluated not only based on zoning classifications, but also on site design, buffering, and observed market behavior.

Zoning Summary

Category	Description
Current Zoning	RA-40 (Residential Agricultural)
Permitted Uses	Low-density residential and agricultural uses
Proposed Zoning	Light Industrial (Conditional)
Proposed Use	Light industrial with outdoor storage
Rezoning Requirement	Required to allow proposed use
Planning Context	Transitional rural corridor with mixed land use influences

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ZONING MAP



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SURROUNDING PROPERTIES



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Parcel ID	Location	Current Use	Land Use	Comments
09414020	Adjacent East	Single-Family Residence	SFR	Improved residential parcel with typical rural homesite characteristics
09414021	Northeast	Single-Family Residence	SFR	Similar residential use with accessory structures observed
09414022 / 09414022A	Northeast Cluster	Single-Family Residences	SFR	Clustered residential development along Waxhaw Highway corridor
09414016	Southwest	Single-Family Residence	SFR	Rural residential parcel with spacing consistent with area
09414015	South	Single-Family Residence	SFR	Larger residential tract with lower density characteristics
09414025	South (Rear)	Agricultural / Vacant	AG	Open land with no significant improvements observed
09411001	North (Across Hwy)	Agricultural / Residential Mix	AG / SFR	Larger tract with residential improvements and open land areas
—	Across Waxhaw Hwy	Railroad Corridor	Infrastructure	Established rail line representing existing non-residential influence
—	Waxhaw Highway	Arterial Roadway	Infrastructure	Primary transportation corridor influencing surrounding land use patterns

The subject property is located within a rural corridor characterized by a mix of residential, agricultural, and infrastructure-related land uses.

Surrounding properties consist primarily of single-family residential dwellings situated on larger lots, interspersed with vacant and agricultural tracts. Development density is relatively low, with significant spacing between improvements.

In addition to residential and agricultural uses, the surrounding area is influenced by existing infrastructure elements, including Waxhaw Highway and a railroad corridor located across the roadway from the subject. These features contribute to a broader land use pattern that is not exclusively residential in nature.

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The presence of these elements, along with the size and configuration of surrounding parcels, reflects a transitional land use environment typical of rural areas experiencing gradual change along transportation corridors.

Surrounding Properties and Area Characteristics

Photographs illustrate surrounding land use patterns and nearby property characteristics.



Adjacent Residential Property – East



Adjacent Residential Property – Rear



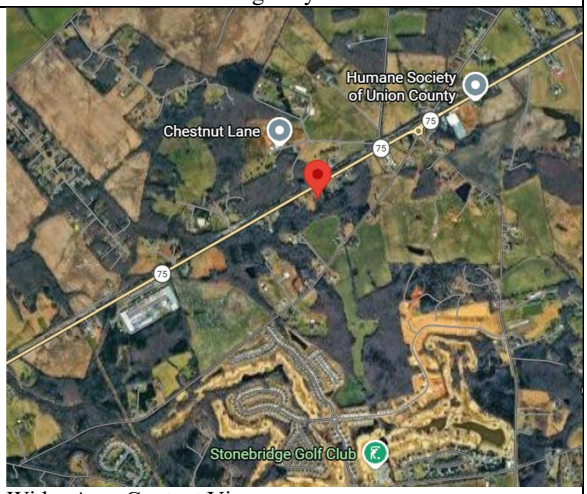
Nearby Properties along Waxhaw Highway



View Across Waxhaw Highway



Railroad Influence across Waxhaw Highway



Wider Area Context View

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Market Evidence and Case Study Analysis

Impact Considerations Summary

Factor	Observation	Market Impact
Traffic	Controlled access design	Not expected to materially affect surrounding properties
Noise	Typical of light industrial use	Consistent with corridor influences
Visual Impact	Buffering and internalized layout	Limited visibility from adjacent properties
Compatibility	Mixed-use rural corridor	Consistent with surrounding land use pattern

Introduction

An important component of evaluating potential impact is the analysis of actual market behavior in similar settings. Rather than relying on theoretical assumptions regarding buyer preferences, this analysis considers how residential properties have performed when located in proximity to light industrial, contractor-oriented, or similar non-residential uses.

The following case studies were selected to evaluate whether measurable or consistent patterns of value diminution are observed in the marketplace. These case studies include both subdivision environments, where direct comparison between exposed and non-exposed properties is possible, and rural residential settings, where buyers evaluate properties across a broader competitive area.

The analysis focuses on identifying whether proximity to such uses results in measurable price differences, extended marketing times, or other indicators of reduced marketability. The objective is not to determine whether preferences may exist, but whether those preferences are reflected in observable and consistent market outcomes.

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Case Study 1

Harkey Creek Subdivision – Monroe, Union County, North Carolina

Harkey Creek is a residential subdivision developed beginning in approximately 2020–2021, consisting of both attached townhome product and detached single-family homes. Portions of the subdivision, particularly along Kristy Lynn Drive and Rowan Lane, are located in proximity to existing contractor-oriented and light industrial uses.

The subdivision represents a transitional environment in which residential development interfaces with established non-residential uses. Within the subdivision, homes vary in degree of exposure, allowing for direct comparison between properties with differing proximity to these uses.

Subset A – Kristy Lynn Drive (Townhomes)

Sales Summary

Category	Count	Avg $/SF	Median $/SF
Kristy Lynn Drive (All Sales)	28	$152.77	$152.55
Non-Kristy Lynn (Subdivision)	23	$143.98	$140.44

Paired Sales Comparison

Unit Type	Exposed Range $/SF	Non-Exposed Range $/SF
1,773 SF	$162 – $169	$149 – $155
1,915 SF	$153 – $157	$145 – $152

Analysis

Within Kristy Lynn Drive, homes with the greatest proximity to adjacent non-residential uses do not exhibit a consistent pricing disadvantage. Paired comparisons of similar unit types indicate that more exposed units frequently achieved pricing equal to or exceeding that of less-exposed units.

While overall pricing differences between Kristy Lynn and other subdivision townhomes are influenced by timing of construction and market appreciation during 2021, direct comparisons within the same street do not demonstrate a consistent pattern of diminished value attributable to proximity.

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Subset B – Rowan Lane (Single-Family)

Sales Summary

Metric	Value
Total Sales	22
Avg $/SF	$161.04
Median $/SF	$158.80
Range	$125 – $210

Resale Indicators

Address	Year	$/SF	DOM
1304 Rowan Ln	2024	$182.24	18
1311 Rowan Ln	2025	$171.82	42
1356 Rowan Ln	2024	$181.09	107

Broader Subdivision Context

Metric	Value
Total SFR Sales	105
Avg $/SF	$181.79
Median $/SF	$176.12

Analysis

The Rowan Lane sales, including both initial construction and subsequent resales, do not exhibit a pattern of reduced pricing or inferior performance relative to other homes within the subdivision. Resale transactions occurring after full build-out, when buyers had complete awareness of surrounding land uses, achieved pricing levels consistent with or exceeding earlier sales.

There is no observable clustering of lower sale prices for homes in closer proximity to adjacent uses, nor is there evidence of prolonged marketing periods or reduced buyer demand. When considered within the broader subdivision context, Rowan Lane properties are competitive within overall neighborhood pricing trends and do not occupy a distinct low-value segment.

Conclusion – Case Study 1

Within the Harkey Creek subdivision, including both townhome and single-family product types, the market does not demonstrate a measurable or consistent reduction in value for properties located in proximity to adjacent light industrial or contractor-oriented uses. This conclusion is supported by both initial construction sales and subsequent resale activity, as well as direct comparison of more exposed and less exposed properties within the same subdivision.

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Case Study 2

9414 Machado Drive – Indian Trail, Union County, North Carolina

The subject property is located in a rural residential setting characterized by scattered single-family homes on one- to three-acre tracts across the Indian Trail, Fairview, and Unionville areas. In this market segment, buyers typically evaluate properties across a broader geographic area rather than within a single neighborhood.

The subject is located within the Piedmont school district, which is generally competitive with nearby Sun Valley and Porter Ridge districts. One comparable is located in the Weddington school district, which is typically considered superior and often commands a pricing premium.

Transaction Summary

Metric	Value
Sale Price	$650,000
Price per SF	$281
Living Area	2,312 SF
Site Size	1.40 Acres
Year Built	1992
Days on Market	48

Competitive Sales

Address	Sale Price	$/SF	DOM
9414 Machado Dr	$650,000	$281	48
4516 Stryker Dr	$680,000	$295	3
3324 McLendon Rd	$543,000	$254	40
825 Fisher Ridge Rd	$425,000	$211	12
7702 Surry Ln	$399,000	$199	4

Analysis

The subject property achieved pricing toward the upper end of the competitive range and does not reflect a discounted position relative to comparable rural residential properties. The highest-priced comparable is located in the Weddington , which generally has higher home values; however, the subject's pricing remains competitive within the dataset.

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The marketing period is within a typical range for rural residential properties and does not indicate diminished buyer interest. The level of renovation and condition observed at the subject is consistent with market-supported investment and does not indicate a location that is functionally impaired or avoided by buyers.

Conclusion – Case Study 2

The sale of 9414 Machado Drive does not demonstrate a measurable or consistent reduction in value attributable to its proximity to a contractor-oriented use. Within the broader rural residential market, the subject's pricing and market performance are consistent with similar properties and do not indicate a systematic discount associated with such proximity.

Observed Market Patterns

Across both case studies, the analysis does not identify a consistent or measurable pattern of value diminution associated with proximity to light industrial or contractor-oriented uses. In a subdivision environment where direct comparison is possible, exposed and non-exposed properties perform similarly. In a broader rural market where buyers have multiple location options, properties in proximity to such uses remain competitive and do not exhibit pricing or marketability penalties.

These findings indicate that while individual buyer preferences may vary, the market does not consistently translate those preferences into measurable differences in value.

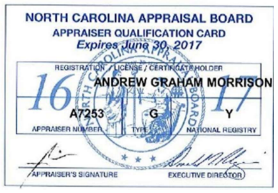
Summary Conclusion

Based on the analysis of the case studies presented, the market does not demonstrate measurable or consistent evidence that proximity to light industrial or contractor-oriented uses results in a reduction in residential property values. The observed data does not support a pattern of diminished pricing or marketability attributable to such proximity.

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Andrew (Andy) Morrison, MAI, CCIM
613 Euclid Street
Monroe, NC 28110



NC Certified General #A7253
Member of the Appraisal Institute #497226

MAI Designated
CCIM Designated Member

EDUCATION

BS Degree – Appalachian State University
Political Science- Pre-Profession Legal Studies
Business Minor- December 2004

APPRAISAL COURSES ATTENDED AND PASSED WITH EXAM

R1 – Introduction to Real Estate Appraisal
Mingle Institute, Charlotte, NC- February 2005

R2 – Valuation Principles and Procedures
Mingle Institute, Charlotte, NC- April 2005

R3- Applied Residential Property Valuation
Mingle Institute, Charlotte, NC- May 2005

USPAP- Mingle Institute, Charlotte, NC- June 2005

G1- Introduction to Income Property Appraisal
Mingle Institute, Charlotte, NC- September 2005

G2- Advanced Income Capitalization Procedures
Mingle Institute, Charlotte, NC- October 2005

G3- Applied Income Property Valuation
Mingle Institute, Charlotte, NC- November 2005

Basic Income Capitalization
The Appraisal Institute, Greensboro, NC- May 2007

USPAP Update- Mingle Institute, Charlotte, NC- May 2007

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Business Practices and Ethics-
The Appraisal Institute, Greensboro, NC- December 2007, Columbia, SC- May 2012
North Carolina General Certified Appraiser State Examination-
Passed December 2007

Report Writing and Valuation Analysis-
The Appraisal Institute, Greensboro, NC- July 2008

Advanced Income Capitalization-
The Appraisal Institute, Greensboro, NC- June 2009

USPAP Update- Mingle Institute, Charlotte, NC- July 2009

Market Analysis and Highest and Best Use-
The Appraisal Institute, Greensboro, NC- July 2009

Advanced Sales Comparison and Cost Approaches
The Appraisal Institute, Greensboro, NC- June 2010

Advanced Applications
The Appraisal Institute, Greensboro, NC- February 2011

Appraisal Institute Comprehensive Examination for the MAI Designation
Passed November 2011

USPAP Update- Erick Little & Company, Charlotte, NC- April 2012, April 2014

SEMINARS

Residential Development- Valuation Trends, Issues, and Challenges
Online- October 2009

Using Spreadsheet Programs in Real Estate Appraisals
The Appraisal Institute, Greensboro, NC- February 2010

The Appraiser and the Site To Do Business: Location, Timing and Demographics
Online-August 2010

Understanding and Using Investor Surveys Effectively
Online- January 2011

Perspectives from Commercial Review Appraisers
Online- July 2011

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The Green Guide to Appraising
McKissock- May 2013

Deriving and Supporting Adjustments
McKissock- May 2013

Evaluation Appraisal Seminar
The NC Chapter of the Appraisal Institute, Oct 2014

Rural Land Valuation
The Appraisal Institute- January 2017

Supervisor/Trainee Course
CPCC- Harris Campus- April 2017

CCIM- CI101: Financial Analysis for Commercial Real Estate
Charlotte, NC- February 2018

CCIM- CI104: Investment Analysis for Commercial Real Estate
Charlotte, NC - March 2019

CCIM- Commercial Real Estate Negotiations
Charlotte, NC- May 2019

CCIM- User Decision Analysis For Commercial Real Estate
Charlotte, NC – October 2019

CCIM Comprehensive Examination for the CCIM Designation
Passed August 2020

March 25, 2026
Stone Pro Material Sales
Rezoning Request (PIN 09414019A)

Bjorn E. Hansen, AICP CTP, CZO
Senior Planner
Union County, NC

Mr. Hansen
Thank you for your correspondence and consideration. We are excited to bring this low impact commercial operation to Union County. As discussed in our letter of intent, the property we wish to rezone is located at 4521 Waxhaw Hwy, in unincorporated Union County. This low impact commercial development will offer wholesale and retail landscaping material offering mulch, stone, rock, sand, black soil and other landscape materials to both contractors and the general public.

We anticipate that the hours of operation will be from 7am-5pm Monday through Friday and 7am-3pm on Saturdays. The facility will be closed on Sundays. With the conversations had with NCDOT, the facility will be accessed by a right in/right out, for all vehicle traffic traveling east on Waxhaw Hwy and a left in for those customers traveling west on Waxhaw Hwy. Waxhaw Hwy is a primary road running from Monroe to the South Carolina line. At the entrance to our site the road is level and straight there will not be an issue with sight lines for departing and entering traffic.

The site will be served with County water and will have onsite septic. We don't anticipate much use of the septic facilities as we only expect to have at most 4-6 employees during peak hours. Electric will be provided by the local electric provider. Garbage service will be contracted with a waste removal company for the low impact development through onsite dumpster. While there will be a gate at the site for security during hours when the operation is closed, the same will be designed with either a lock box for fire or emergency services or a Yelp system.

The site is designed to have a stormwater retention pond to ensure control of stormwater management and water quality. All storm water and surface water will be directed to the onsite storm water management pond. No erosion or sedimentation leaving site is anticipated. Erosion and Sediment controls will be used during construction.

It is anticipated that the site will be in harmony with neighboring uses as described in our Impact Study commissioned and provided to the County. The site will have restricted access during hours when the site is closed and as such limited security lighting is anticipated for the site. In addition, significant screening will be provided around the property to include S2 Screening as well as natural buffers to allow for screening for our adjacent neighbors. The intended use will be in harmony with the adjacent land uses to include the railroad corridor, surrounding agricultural uses and surrounding residential uses.

The following outlines and answers 80.110-H Findings and Conclusions Required for Approval.

1. The proposed use for this development will comply with all regulations and standards generally applicable within the zoning district LI CZ and specifically applicable to the particular type of special use.
   The proposed use is Light Industrial with outdoor storage of landscaping materials,

office space and indoor storage. This use will comply with all regulations and standards applicable to the LI CZ zoning district.

2. The Proposed development will not materially endanger the public health or safety. Considerations:
   a. Traffic conditions in the vicinity, including the effect of additional traffic on streets and street intersections, sight lines at street intersections and curb cuts;
   Using the ITE Trip Generation Rates for General Light Industrial 110 per disturbed acre the expected AM hour Trips would be 26, the PM hour would be 25 showing a minimal amount of additional traffic. Waxhaw Highway is straight and level through this area so sight lines will not be an issue. We will coordinate with Union County and NCDOT though the design phases for the intersection and driveway permits.
   b. Provisions of services and utilities, including water, sewer, electrical, garbage collections and fire protection.
   It is anticipated that water will be supplied by Union County Public Works, Sewer will be on site septic. Preliminary soils studies have been performed and will support the septic system. Electric will be provided by the local electricity company. Garbage collection will be contracted through a private provider with an onsite dumpster. Fire protection will be provided by the Mineral Springs Fire Department.
   c. Soil erosion and sedimentation; and
   Soil and Erosion Control permits will be obtained prior to starting any onsite construction and will be maintained throughout construction.
   d. Protection of public, community, or private water supplies, including possible adverse effects on surface waters or groundwater.
   All county and state regulations will be met or exceeded for construction and separation for the septic systems, the temporary sediment control basins and the permanent stormwater control measures.
3. The proposed development will not substantially injure the value of abutting property, or is a public necessity. Considerations:
   a. The relationship of the proposed use and the character of development to surrounding uses and development, including possible conflicts between them and how these conflicts will be resolved; and
   The property is currently vacant and situated within a predominantly rural area characterized by a mix of residential, agricultural, and infrastructure-related land uses. This site will be providing a buffer of S2 landscaping and utilizing the existing tree coverage to alleviate possible conflicts.
   b. Whether the proposed development is so necessary to the public health, safety, and general welfare of the county as a whole as to justify it regardless of its impact on the value of abutting property.
   This development will provide to the surrounding area landscaping supplies that contractors will utilize in the local area and be convenient to the local do it yourself yard and lawn care folks.
4. The proposed development will be in harmony with the area in which it is located. Considerations:
   a. The relationship of the proposed use and the character of development to surrounding uses and development, including possible conflicts between them and how these conflicts will be resolved or mitigated
   The property is currently vacant and situated within a predominantly rural area

characterized by a mix of residential, agricultural, and infrastructure-related land uses. This site will be providing a buffer of S2 landscaping and utilizing the existing tree coverage to alleviate possible conflicts.

5. The proposed development will be in general conformity with the comprehensive plan.
   Looking at the Union County 2050 Land Use Map, this site would fall in the Waxhaw Highway (Highway 75) Employment Corridor.

   The subject property is located within a rural corridor characterized by a mix of residential, agricultural, and infrastructure-related land uses.
   Surrounding properties consist primarily of single-family residential dwellings situated on larger lots, interspersed with vacant and agricultural tracts. Development density is relatively low, with significant spacing between improvements.
   In addition to residential and agricultural uses, the surrounding area is influenced by existing infrastructure elements, including Waxhaw Highway and a railroad corridor located across the roadway from the subject. These features contribute to a broader land use pattern that is not exclusively residential in nature.
   The presence of these elements, along with the size and configuration of surrounding parcels, reflects a transitional land use environment typical of rural areas experiencing gradual change along transportation corridors.

We are very excited to work with Union County in developing our project. Please email or call me with any questions or concerns that have not been addressed.

Sincerely,

Thomas Marcham
847-302-8577

BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2026-001)

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-001) submitted by Tom Marcham, requesting a revision of the Union County Zoning Map by rezoning one parcel of land totaling approximately 5 acres appearing on the tax map as tax parcel 09-414-019A on NC 75 from RA-40 to Light Industrial (LI) with Conditions.

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

Motion

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

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

Motion

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

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

The Union County Land Use Board recommended that the Union County Board of Commissioners approve the rezoning petition (CZ-2026-001), submitted by Tom Marcham, requesting a revision of the Union County Zoning Map by rezoning one parcel of land totaling approximately 5 acres appearing on the tax map as tax parcel 09-414-019A along NC 75 from RA-40 to Light Industrial (LI) with Conditions.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2026-001)

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

1. The proposed rezoning is within an area identified as Employment Corridor in the Plan's Land Use Map. The Plan provides that a variety of employment uses may be appropriate in an Employment Corridor, including distribution, logistics, aeronautics, industrial, and agri-business uses. The proposed use is consistent with uses identified for Employment Corridor in the Plan.
2. The proposed use will provide a needed service to nearby residents.
3. The proposed site plan can meet development standards within the Unified Development Ordinance.
4. The tract of land is not overly small for the general area in which it is located and is reasonable in size for the use contemplated.
5. Although the immediate surrounding properties are zoned for residential uses primarily, the property has direct access to NC-75. The property is also located with an approximately three-quarter mile radius of several existing commercial and industrial uses, including several properties zoned as light industrial.
6. The benefits to the community at large, the neighbors, and the property owners of the proposed rezoning outweigh any detriments to the neighbors and others caused by the rezoning. The benefits of this rezoning include increasing business opportunities in Union County, allowing a property with nearby non-residential uses in the area to also be allowed to conduct non-residential uses on its property, and increasing access to use of a service to nearby residents. The potential detriments of the use established by this rezoning include any increased noise, light, and traffic exposure resulting from the proposed use that could affect nearby properties.

CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLAN) (CZ-2026-001)

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

1. The proposed rezoning will facilitate ongoing and potential future industrial uses in close proximity to existing residential uses.
2. Allowed industrial use on the property could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is a noted concern in the Plan.

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

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

WHEREAS, Union County has received rezoning petition (CZ-2026-001) submitted by Tom Marcham (the "Applicant"), requesting a revisions of the Zoning Map by rezoning one parcel of land totaling approximately 5 acres appearing on the tax map as tax parcel 09-414-019A along NC 75 from RA-40 to Light Industrial (LI) with Conditions (the "Rezoning Petition"); and

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

WHEREAS, the Board has determined that approval of the Rezoning Petition and rezoning the subject parcel from RA-40 to Light Industrial (LI) with Conditions is reasonable and in the public interest, including for those reasons set forth in the contemporaneously adopted consistency and reasonableness statement.

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

1. The Zoning Map is hereby amended by rezoning the parcel appearing on the tax map as tax parcel 09-414-019A located along NC 75 from RA-40 to Light Industrial (LI) with Conditions.

2. The conditions accepted by the Applicant are hereby approved and incorporated into the Light Industrial (LI) with Conditions rezoning of the parcel.

3. This ordinance is effective upon adoption.

Adopted this _____ day of _____, 2026.

_____
Brian Helms
Chair, Union County Board of Commissioners

File #: 26-271 **Agenda Date:** 5/18/2026

TITLE:

Public Hearing - Rezoning Petition CZ-2026-006 House of Pearls

INFORMATION CONTACT:

John Wear, Planning Department, Senior Planner - Current Planning, 704-283-3605

ACTION REQUESTED:

Conduct public hearing for proposed rezoning.

PRIOR BOARD ACTION:

None.

BACKGROUND:

This case is a request to rezone an approximately 10.92 acre portion of one parcel totaling 12.21 acres appearing on the tax map as tax parcel 02-226-017 located on Camden Road from RA-40 to a Master Planned Development District. The request is to develop a long-term residential drug rehabilitation facility for up to 80 residents and staff. The rezoning request is a conditional rezoning and includes the following conditions:

- The use shall be limited to a residential recovery and life-skills program.
- The maximum duration of residency for program participants shall be twenty-four (24) months. The minimum duration of residency for program participants shall be ninety (90) days.
- The use shall not include medical detoxification or inpatient clinical treatment services.
- The use shall not be converted to a shelter, boarding house, correctional facility, halfway house for parolees, or a use not specifically allowed by these conditions.
- Overnight occupancy shall be limited to enrolled program participants and on-site staff only.
- The maximum number of residents shall not exceed 80.
- The development may occur in phases.
- All outdoor lighting shall utilize full cutoff fixtures and shall be directed away from adjacent properties.
- Organized outdoor activities shall not occur on site between 9 PM and 7 AM.

- A local contact person shall be provided to adjacent property owners and the County and updated annually.
- No onsite parking for resident vehicles.

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

If the Board of Commissioners wishes to make a decision on the rezoning petition, it 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-2026-006; and (ii) adopt the consistency and reasonableness statement for denial.

FINANCIAL IMPACT:

None.

Application for Conditional Rezoning

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

General Information

Project Address 0 Camden Road City Marshville State NC Zip 28103

Tax Parcel ID 02226017 Current Zoning Designation RA-40 Total Acres 12.21

Proposed Zoning Designation RA-40 (CD) Date Submitted 2/18/2026

Contact Information

Applicant Name Steve Merritt (His Perfect Love Ministries Inc)

Address PO Box 516 City Marshville State NC Zip 28111

Phone 704-622-6030 Fax _____ Email _____

Property Owner Name Steve Merritt (His Perfect Love Ministries Inc)

Address PO Box 516 City Marshville State NC Zip 28111

Phone 704-622-6030 Fax _____ Email _____

Applicant's Certification

Signature | 2/23/2026 Date | STEVEN D. MERRITT. CHAIRMAN OF BOARD Printed Name/Title

Owner's Certification (include names and signatures of all owners)

Signature | 2/23/2026 Date | STEVEN D. MERRITT CHAIRMAN OF BOARD Printed Name/Title

Union County Office Use Only:

Case Number: _____ Date Received: _____

Amount of Fee: _____ Fee Ok: _____ Received by: _____

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

UNIONCOUNTY north carolina

**This document is only valid from July 1, 2025 - June 30, 2026

The House of Pearls is a non-profit, 501(c)3, Christian ministry dedicated to helping women rebuild their lives through the love of Jesus Christ.

House of Pearls is a long-term addiction and heart restoration program where women voluntarily reside at no cost to them and learn the healing power of the Word of God through intensive bible study and teaching. While in the program, the residents are also taught various life skills including:

- **manners and etiquette**
- **communication**
- **accountability**
- **budgeting**
- **cooking**
- **work ethics**
- **G.E.D**

Embark on a journey of faith and recovery with our 1-year Faith Based Christian program, where faith meets recovery and transformation happens.

The purpose of House of Pearls is best summarized in our mission statement, which is, “To provide a safe environment for women to heal, restore, and rebuild their lives, embracing and representing the love of Jesus Christ." God has provided the Cross of Jesus Christ as the only true escape from bondage. At the House of Pearls, we seek to point women to the reality of the indwelling Christ as the ever-present Savior from sin and His provision of the Holy Spirit who transforms people in every area of their life. When coming to the House of Pearls, the ladies will embark on a journey of faith and recovery with our 1-year Faith Based Christian program, where faith meets recovery and transformation happens.

Camden Rd, Marshville, NC 28103 - House of Pearls Project

Tax Parcel **02226017**

Subject: Development of Faith Based Housing Community for Women in Recovery

To Whom It May Concern,

This Letter of Intent outlines our plan to develop a supportive residential community designed to provide a safe, structured, and restorative environment for women recovering from substance abuse.

The proposed property will include the construction of eight residential homes and one central gathering center. Each home will accommodate nine women residents and one live-in House Manager, creating a supportive, family-style living environment that fosters accountability, stability, and peer encouragement. In total, the community will serve up to seventy-two women at full capacity.

The central gathering center will include office space for administrative operations, meeting areas for group programming, and a full kitchen to support communal activities and life-skills training. This facility will serve as the heart of the community, offering educational programming, recovery meetings, counseling sessions, and workshops.

To ensure the safety and stability of the residents, onsite staff will be present 24 hours a day, seven days a week. An Executive Director will be onsite during normal business hours to oversee daily operations, staff supervision, program coordination, and compliance with all applicable regulations.

In addition to residential supervision, we will periodically host licensed counselors, pastors, educators, and trained volunteers who will provide supportive services, including recovery education, life-skills training, spiritual guidance (upon request), and personal development programming. These services are designed to equip residents with the tools necessary for long-term sobriety, employment readiness, and successful reintegration into independent living.

Our mission is to create a secure, faith based structured, and compassionate environment where women can heal, rebuild their lives, and develop the skills and confidence necessary to achieve sustainable recovery.

We are committed to operating this community responsibly, maintaining high standards of safety and accountability, and being a positive and collaborative presence within the surrounding community.

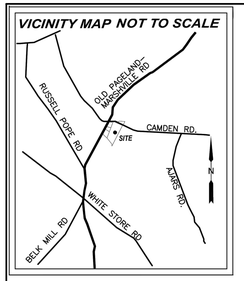
Thank you for your consideration of this important initiative. We welcome the opportunity to provide any additional information needed.

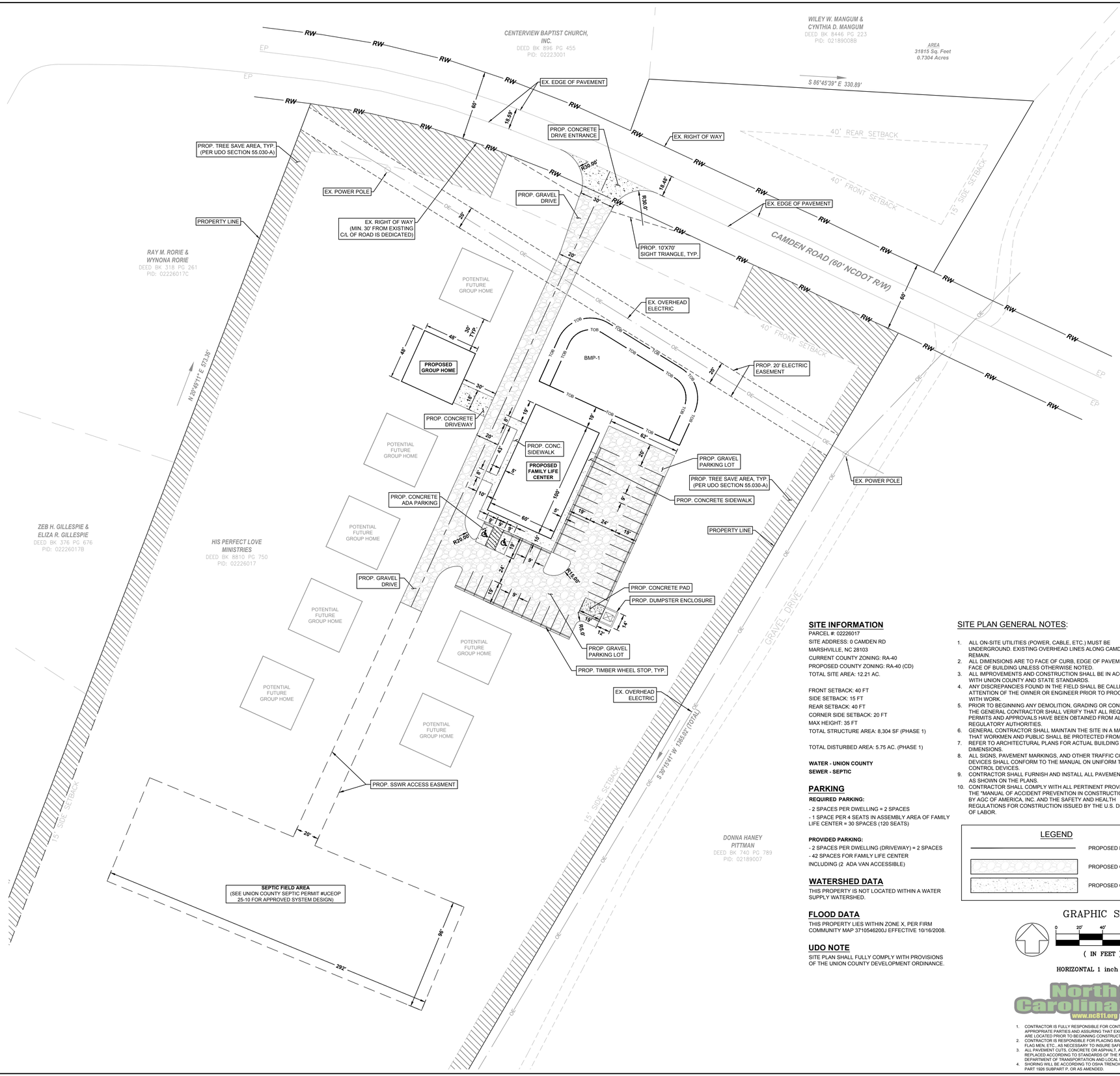
Sincerely,
Steven D. Merritt

His Perfect Love Ministries – House of Pearls

704-622-6030

Sdmerritt13@aol.com





SITE INFORMATION

PARCEL #: 02226017
SITE ADDRESS: 0 CAMDEN RD
MARSHVILLE, NC 28103
CURRENT COUNTY ZONING: RA-40
PROPOSED COUNTY ZONING: RA-40 (CD)
TOTAL SITE AREA: 12.21 AC.

FRONT SETBACK: 40 FT
SIDE SETBACK: 15 FT
REAR SETBACK: 40 FT
CORNER SIDE SETBACK: 20 FT
MAX HEIGHT: 35 FT
TOTAL STRUCTURE AREA: 8,304 SF (PHASE 1)

TOTAL DISTURBED AREA: 5.75 AC. (PHASE 1)

WATER - UNION COUNTY
SEWER - SEPTIC

PARKING

REQUIRED PARKING:

- 2 SPACES PER DWELLING = 2 SPACES
- 1 SPACE PER 4 SEATS IN ASSEMBLY AREA OF FAMILY LIFE CENTER = 30 SPACES (120 SEATS)

PROVIDED PARKING:

- 2 SPACES PER DWELLING (DRIVEWAY) = 2 SPACES
- 42 SPACES FOR FAMILY LIFE CENTER INCLUDING (2 ADA VAN ACCESSIBLE)

WATERSHED DATA

THIS PROPERTY IS NOT LOCATED WITHIN A WATER SUPPLY WATERSHED.

FLOOD DATA

THIS PROPERTY LIES WITHIN ZONE X, PER FIRM COMMUNITY MAP 3710546200J EFFECTIVE 10/16/2008.

UDO NOTE

SITE PLAN SHALL FULLY COMPLY WITH PROVISIONS OF THE UNION COUNTY DEVELOPMENT ORDINANCE.

SITE PLAN GENERAL NOTES:

1. ALL ON-SITE UTILITIES (POWER, CABLE, ETC.) MUST BE UNDERGROUND. EXISTING OVERHEAD LINES ALONG CAMDEN RD MAY REMAIN.
2. ALL DIMENSIONS ARE TO FACE OF CURB, EDGE OF PAVEMENT, OR FACE OF BUILDING UNLESS OTHERWISE NOTED.
3. ALL IMPROVEMENTS AND CONSTRUCTION SHALL BE IN ACCORDANCE WITH UNION COUNTY AND STATE STANDARDS.
4. ANY DISCREPANCIES FOUND IN THE FIELD SHALL BE CALLED TO THE ATTENTION OF THE OWNER OR ENGINEER PRIOR TO PROCEEDING WITH WORK.
5. PRIOR TO BEGINNING ANY DEMOLITION, GRADING OR CONSTRUCTION, THE GENERAL CONTRACTOR SHALL VERIFY THAT ALL REQUIRED PERMITS AND APPROVALS HAVE BEEN OBTAINED FROM ALL REGULATORY AUTHORITIES.
6. GENERAL CONTRACTOR SHALL MAINTAIN THE SITE IN A MANNER SO THAT WORKMEN AND PUBLIC SHALL BE PROTECTED FROM INJURY.
7. REFER TO ARCHITECTURAL PLANS FOR ACTUAL BUILDING DIMENSIONS.
8. ALL SIGNS, PAVEMENT MARKINGS, AND OTHER TRAFFIC CONTROL DEVICES SHALL CONFORM TO THE MANUAL ON UNIFORM TRAFFIC CONTROL DEVICES.
9. CONTRACTOR SHALL FURNISH AND INSTALL ALL PAVEMENT MARKINGS AS SHOWN ON THE PLANS.
10. CONTRACTOR SHALL COMPLY WITH ALL PERTINENT PROVISIONS OF THE "MANUAL OF ACCIDENT PREVENTION IN CONSTRUCTION" ISSUED BY AGC OF AMERICA, INC. AND THE SAFETY AND HEALTH REGULATIONS FOR CONSTRUCTION ISSUED BY THE U.S. DEPARTMENT OF LABOR.

LEGEND

- PROPOSED BUILDING
- PROPOSED GRAVEL
- PROPOSED CONCRETE

GRAPHIC SCALE

0 20' 40' 80'

(IN FEET)

HORIZONTAL 1 inch = 40 ft.

North Carolina 811 www.nc811.org

1. CONTRACTOR IS FULLY RESPONSIBLE FOR CONTACTING APPROPRIATE PARTIES AND ASSURING THAT EXISTING UTILITIES ARE LOCATED PRIOR TO BEGINNING CONSTRUCTION.
2. CONTRACTOR IS RESPONSIBLE FOR PLACING BARRICADES USING FLAG MEN, ETC., AS NECESSARY TO INSURE SAFETY.
3. ALL PAVEMENT CUTS, CONCRETE OR ASPHALT, ARE TO BE REPLACED ACCORDING TO STANDARDS OF THE NORTH CAROLINA DEPARTMENT OF TRANSPORTATION AND LOCAL MUNICIPALITIES.
4. SHORING WILL BE ACCORDING TO OSHA TRENCHING STANDARDS PART 1926 SUBPART P, OR AS AMENDED.

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GATEWAY DESIGN GROUP, PLLC
8516 FOXBRIDGE DR WEDDINGTON, NC 28104
910-840-2661
NC FIRM # P-2147

NORTH CAROLINA PROFESSIONAL SEAL 055352 ENGINEER MARK A. DIAMOND
2026.02.23 08:54:34-05'00'

HOUSE OF PEARLS

Project Address: 0 Camden Rd, Marshville, NC 28103

NO.	BY	DATE	REVISION

PROJECT #: 2024-173 DATE: 2/23/2026
DRAWN BY: MD CHECKED BY: MD

TITLE
SITE PLAN

SHEET NO.
C-2.0

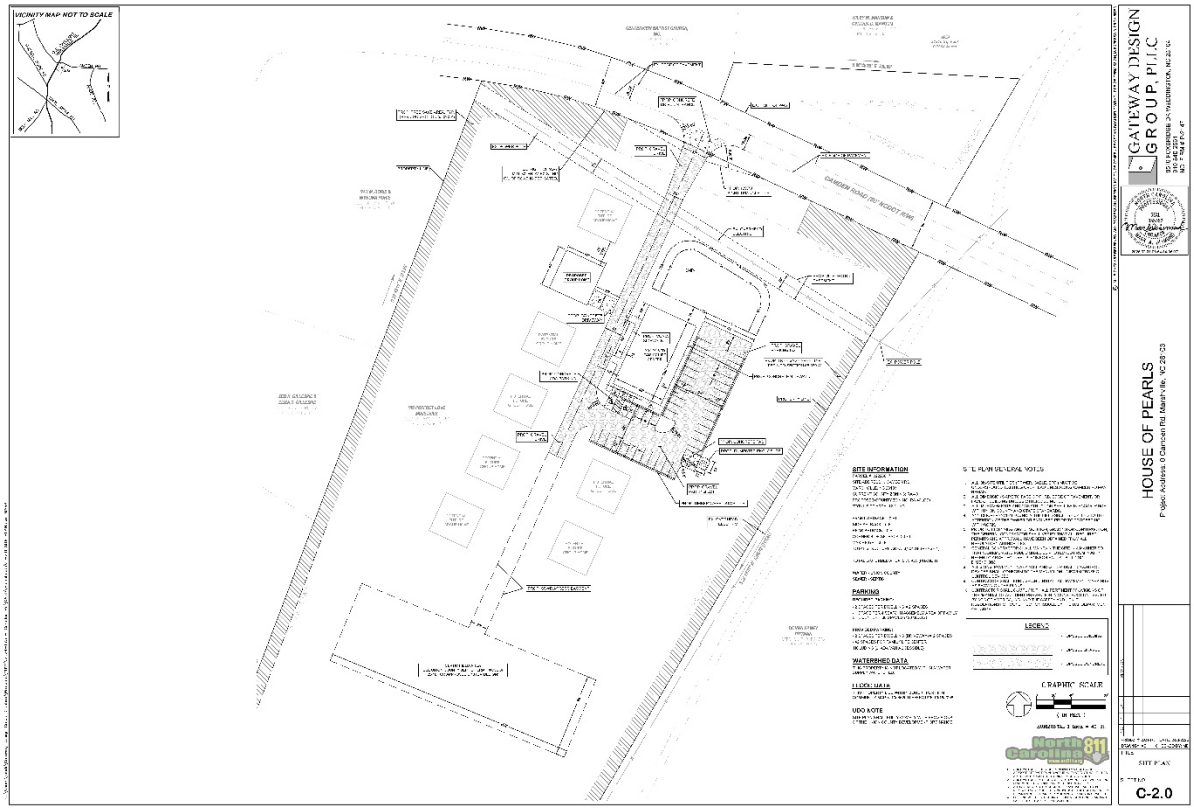
C:\Users\mark\Gateway Design Group Dropbox\Projects\2024\2024-173 – Camden Rd\CADD\Plotsheets\C-2.0 SITE PLAN.dwg MARK

Rezoning Request CZ-2026-006 House of Pearls

This case is a request to rezone an approximately 10.92 acre portion of one parcel totaling 12.21 acres appearing on the tax map as tax parcel 02-226-017 located on Camden Road from RA-40 to a Master Planned Development District. The request is to develop a long-term residential drug rehabilitation facility for up to 80 residents and staff. The rezoning request is a conditional rezoning, and includes the following conditions:

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

Planning Department
500 North Main Street, Suite 70
Monroe, NC 28112
T 704.283.3565
unioncountync.gov



Contact Information

1. Staff: John Wear, Senior Planner, 704-283-3605, john.wear@unioncountync.gov
2. Owner: His Perfect Love Ministries, Inc., PO Box 516, Monroe, NC 28111
3. Applicant: Steve Merritt, PO Box 516, Monroe, NC 28111

Property Information

Located on the south side of Camden Road east of Old Pageland Marshville Road. Location more specifically described as tax parcel 02-226-017.



Site



North of Site



West of Site



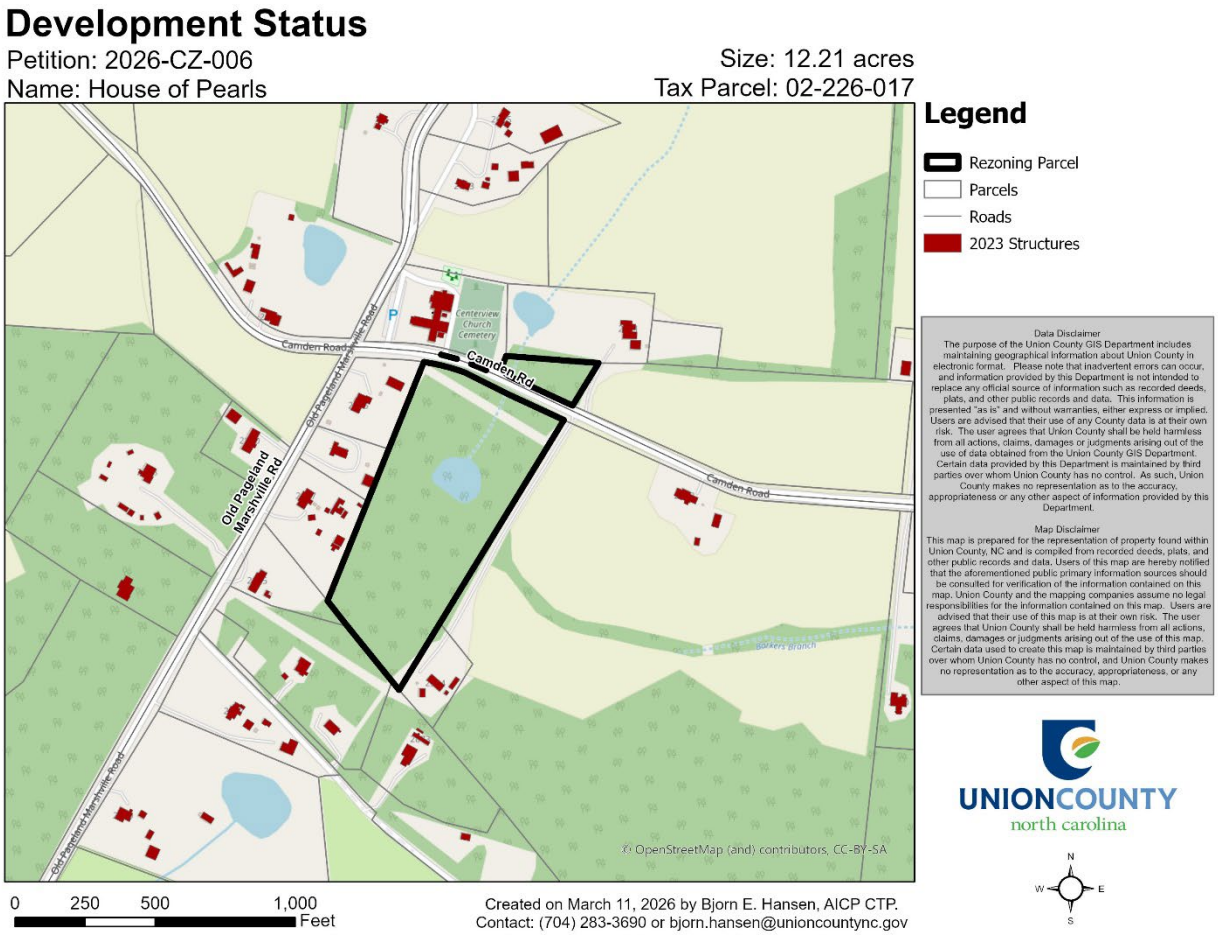
East of Site

Municipal Proximity

The site is approximately four miles south of Marshville and Wingate.

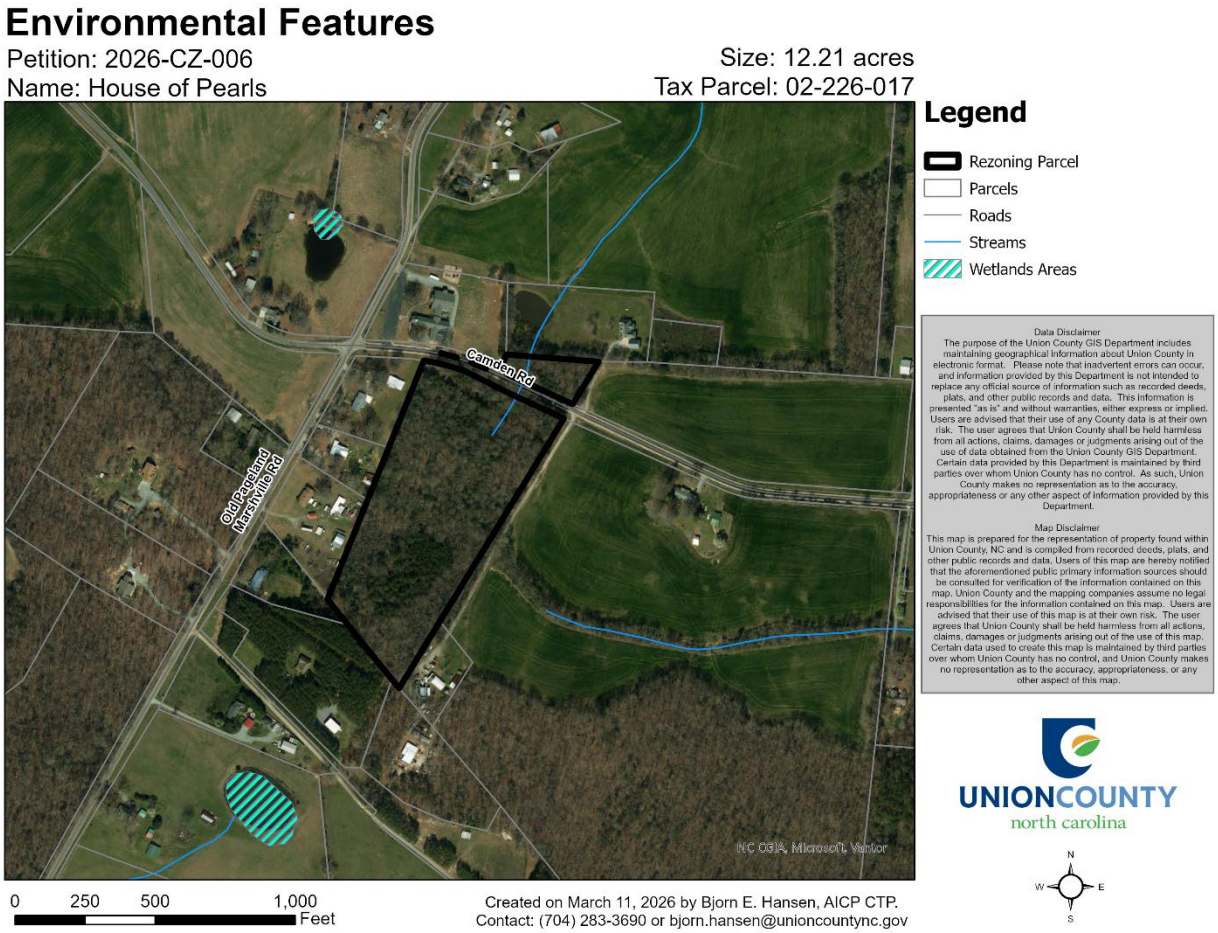
Existing Land Use and Development Status

The parcel is currently zoned RA-40 and is undeveloped and forested.



Environmental Features

There is a stream on the northern edge of the site that is incorporated into the stormwater pond. There are no other environmental features.

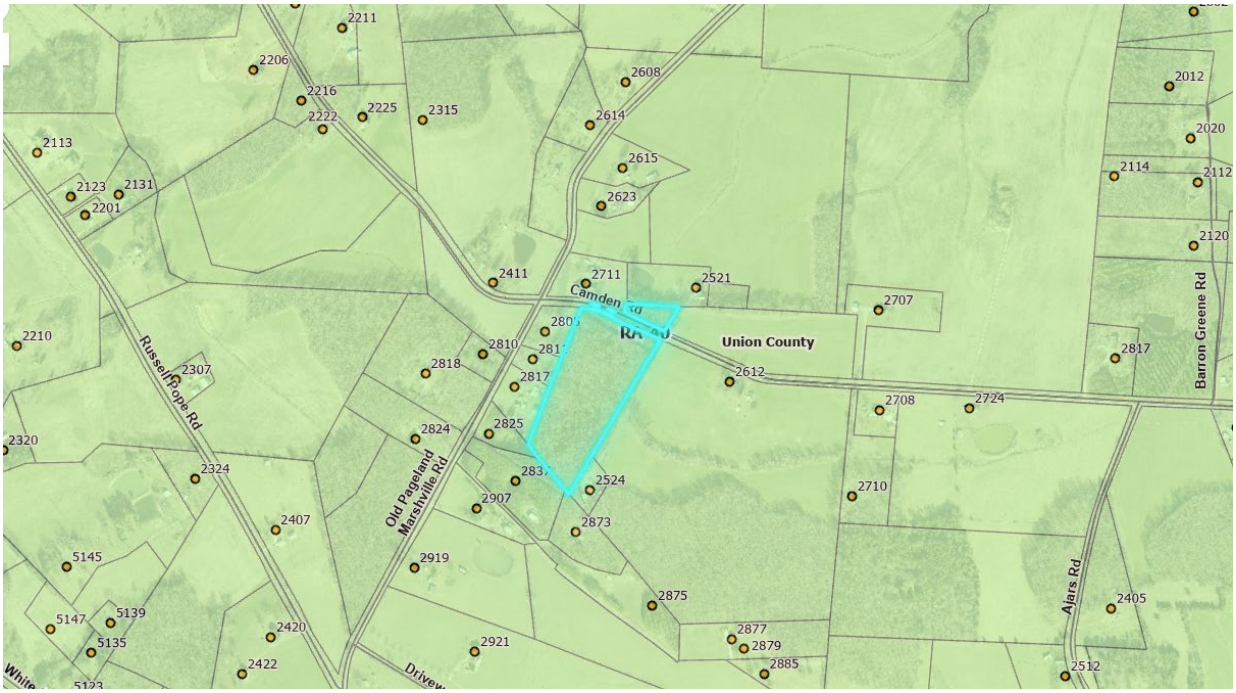


Utilities

Public water is available to the site with an extension from Old Pageland Marshville Road. The site will utilize an engineered septic system.

Zoning and Land Use History

There have been no proposed rezonings or special use permits on this site or in the immediate vicinity since zoning was implemented in Union County. The site is undeveloped.

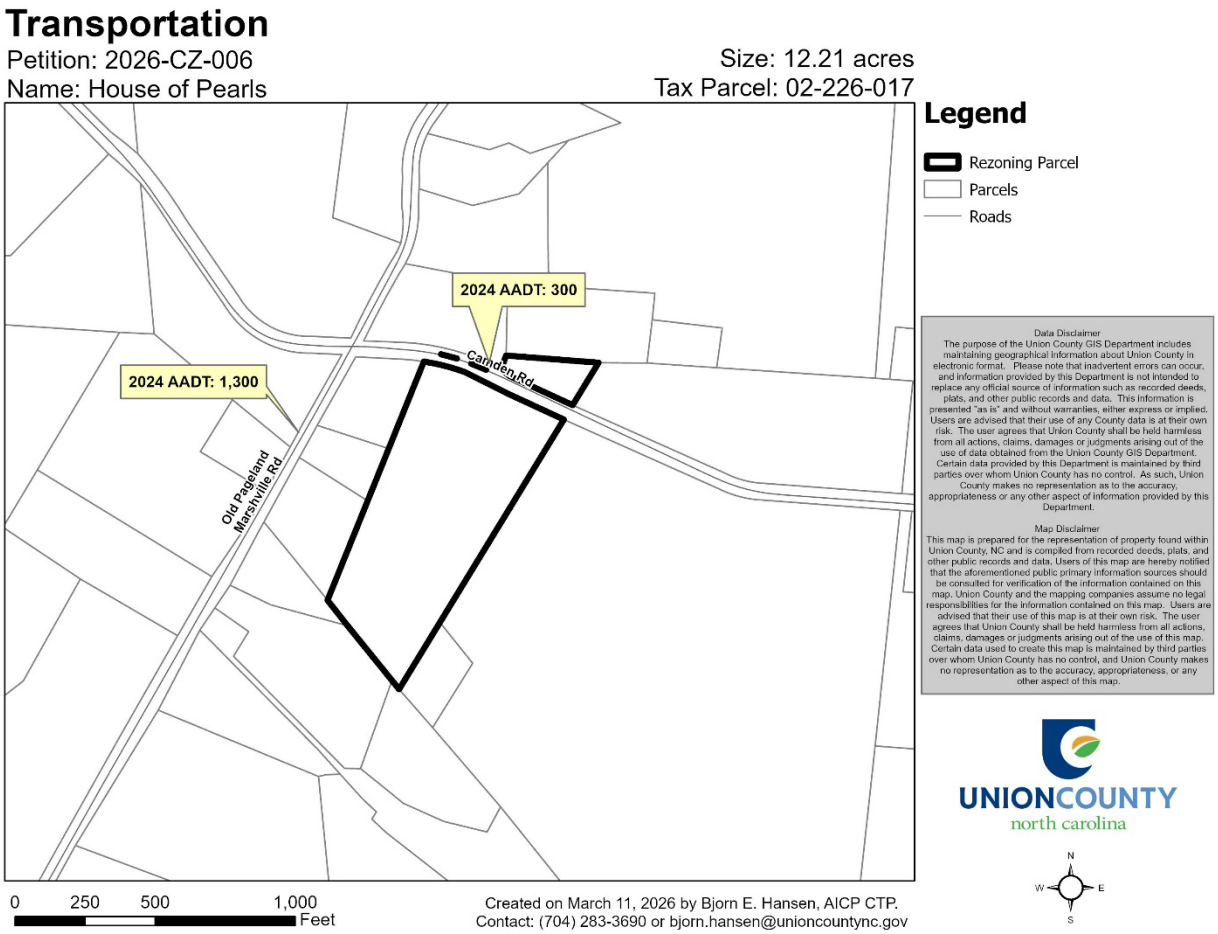


Schools

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

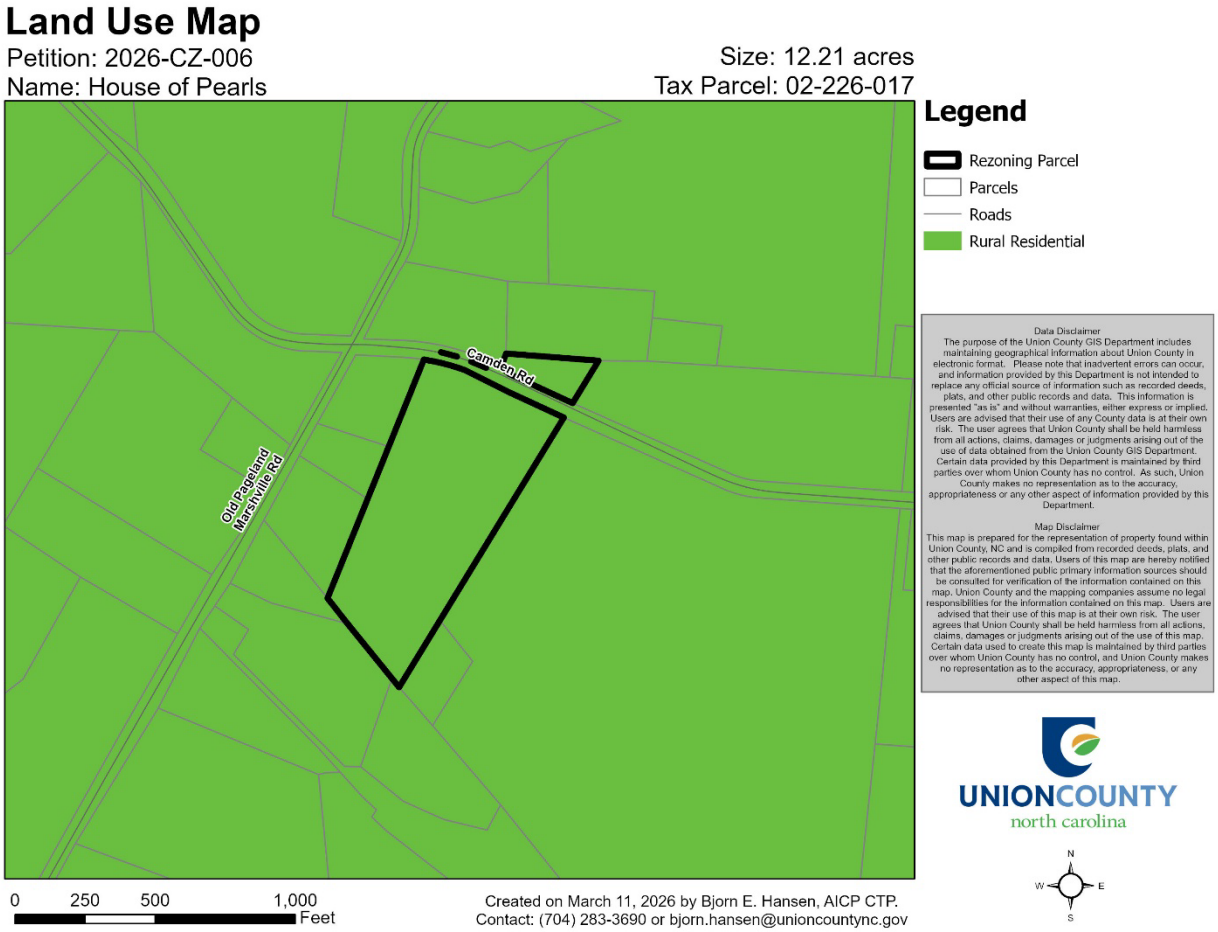
Transportation

This site is on Camden Road, which is a NCDOT-maintained facility. This section of Camden Road carries approximately 300 vehicles per day. There are no funded road improvement projects in the immediate vicinity of the rezoning. A traffic Impact Analysis (TIA) was not required for this rezoning. The anticipated traffic impact from this site is expected to be low.



Union County Comprehensive Plan

The Union County 2050 comprehensive plan identifies this area as Rural Residential. Group living facilities such as what is proposed in this rezoning are typically accommodated on RA-40 zoned properties through the special use permit (SUP) process.



Public and Municipal Comments

Public Comments

A community meeting was required and was held on March 31, 2026. A total of 19 residents attended the meeting and asked questions about fencing, signage, lighting, and stormwater impacts. No changes were made to the site plan as a result of the meeting.

Municipal Comments

Marshville and Wingate were not consulted due to the distance to their municipal limits.

Recommendations

Land Use Board

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

Planning Department

This part of Union County is identified for rural residential and agricultural land uses. The proposed zoning is consistent with the adopted Plan because the use is typically allowed through the special use permit process. A SUP is not possible due to the phasing proposed for this facility – a new SUP would be required for every additional structure built one year after the SUP was granted. The proposed zoning district would provide flexibility for the owner and the proposed conditions limit future changes if the property is sold. The proposed use is therefore considered appropriate for the area. Because of these aspects of the development, staff recommend **approval** of this rezoning application.

From: Steve Merritt
To: Bjorn Hansen
Cc: Mark Diamond
Subject: Re: House of Pearls Rezoning Application
Date: Tuesday, April 7, 2026 6:29:43 AM

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Good Morning Bjorn,

I am requesting a five year vesting rights as a condition of this rezoning for The House of Pearls project located on Camden Rd in Marshville, NC. Thanks and have a great day!!

Steve Merritt
His Perfect Love Ministries
House of Pearls
704-622-6030

On Monday, April 6, 2026 at 11:55:04 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Steve, hopefully the last email today. I don't see any email or correspondence requesting the five-year vesting of this rezoning (if approved). State law says you automatically get two years guaranteed to start development of your project, but you can request up to five years. The benefit is that it protects you from a potential downzoning by the County if you don't move forward with the project. It is typical for applicants to request five years, but you have to request it. Weird, I know. All you have to do is email back and state you are requesting five year vesting rights as a condition of this rezoning.
>
> Sincerely,
>
> Bjorn
>
> **Bjorn E. Hansen, AICP CTP, CZO**
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
> unioncountync.gov
>
> ***We're committed to excellent service.*** *Share your feedback in this short survey.*
>
> E-mail correspondence to and from this sender may be subject to the North Carolina Public Records law and may be disclosed to third parties. If you are not the intended

recipient of this e-mail, please contact the sender immediately.

From: Steve Merritt <sdmerritt13@aol.com>
Sent: Friday, April 3, 2026 5:57 AM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Good Morning Bjorn,
Please find the Minutes and Sign In Sheets for the Community meeting held for the House of Pearls Camden Rd Project. Thanks for your help and have a great Easter!!!

Steve Merritt
House of Pearls
704-622-6030

On Thursday, March 19, 2026 at 09:53:31 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Thanks, Steve. When we see each other at the community meeting could you please have a signed copy.
>
> Take care.
>
> Bjorn
>
> **Bjorn E. Hansen, AICP CTP, CZO**
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
> unioncountync.gov
>
> ***We're committed to excellent service.*** *Share your feedback in this short survey.*
>
> E-mail correspondence to and from this sender may be subject to the North Carolina Public Records law and may be disclosed to third parties. If you are not the intended recipient of this e-mail, please contact the sender immediately.
>
> ---
>
> **From:** Steve Merritt <sdmerritt13@aol.com>

Sent: Thursday, March 19, 2026 6:36 AM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Good Morning Bjorn,
Please find attached the letter from the Secretary/Treasurer of His Perfect Love Ministries and The House of Pearls explaining my realtionship with this organization. Thanks and have a great day!!

Steve Merritt
House of Pearls
704-622-6030

On Monday, March 16, 2026 at 04:47:28 PM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Sounds good. I will note that in the conditions of the rezoning.
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
>
> unioncountync.gov
>
> ***We're committed to excellent service.*** *Share your feedback in this short survey.*
>
> E-mail correspondence to and from this sender may be subject to the North Carolina Public Records law and may be disclosed to third parties. If you are not the intended recipient of this e-mail, please contact the sender immediately.

From: Steve Merritt <sdmerritt13@aol.com>
Sent: Monday, March 16, 2026 4:45 PM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Bjorn,

I think just the portion where the facility is located.

Steve

On Monday, March 16, 2026 at 10:41:23 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Good morning,
>
> Please confirm you would like the entire parcel rezoned versus just the portion on the south side of Camden Road where the facility will be located.
>
> Sincerely,
>
> Bjorn
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Sent: Wednesday, March 11, 2026 10:05 AM
To: mark@gatewaydesigngroup.com; 'Steve Merritt' <sdmerritt13@aol.com>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application

I have attached the mailing labels for the community meeting. Something to think about for the rezoning is the fact you have a portion of the property on the north side of the road (see attached land use map). You might want to sell it in the future, and it is not necessary to rezone to MPD. You can clarify in your letter of intent to say that this rezoning only applies to the portion on the south side of Camden Road. If you want the rezoning to apply to all of the property, just let me know.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: mark@gatewaydesigngroup.com <mark@gatewaydesigngroup.com>
Sent: Wednesday, March 11, 2026 8:26 AM
To: 'Steve Merritt' <sdmerritt13@aol.com>; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application

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Good morning Bjorn,

Please see attached rezoning documents.

Thanks!

Mark Diamond, P.E.

Project Manager

Gateway Design Group, PLLC

919-368-8867

8516 Foxbridge Drive

Weddington, NC 28104

From: Steve Merritt <sdmerritt13@aol.com>
Sent: Wednesday, March 11, 2026 8:21 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

Bjorn,

I believe Mark Diamond sent all of that information to you via email last week.

Mark can you resend that information to Bjorn? Thanks

Steve Merritt

On Wednesday, March 11, 2026 at 08:13:28 AM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Steve,
>
> I appreciate you being proactive with the community meeting work, but we need the rezoning application to be submitted before any letters can be sent out. I am in the office today and then out Thursday and Friday. Let me know if you are able to drop the materials off today.
>
> I made a few proposed changes in Track Changes in the attached document.
>
> Sincerely,
>
> Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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From: Steve Merritt <sdmerritt13@aol.com>
Sent: Wednesday, March 11, 2026 7:42 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Good Morning Bjorn,

Please find the Notice Letter (Community Meeting) attached. Thanks and have a great day!!!

Schedule is March 31, 2026

Dinner Served at 6:00

Meeting to start at 6:30

Centerview Baptist Church - Fellowship Building

2711 Old Pageland-Marshville Rd

Marshville, NC

Steve Merritt

House of Pearls

His Perfect Love Ministries

704-622-6030

On Monday, March 9, 2026 at 02:02:39 PM EDT, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Will do. It's on my calendar. Please submit the application materials and draft community letter for me to review ASAP. I can then send you the address list for you to mail the meeting notices to. The letters need to be in the mail by next Friday.
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department
>
> **T** 704.283.3690
>
> bjorn.hansen@unioncountync.gov
>
> unioncountync.gov
>
> ***We're committed to excellent service.*** *Share your feedback in this short survey.*
>
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From: sdmerritt13 (null) <sdmerritt13@aol.com>
Sent: Monday, March 9, 2026 1:56 PM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Ok. That makes sense. Let's lock in Tuesday March 31.

Steve

Sent from my iPhone

> On Mar 9, 2026, at 1:36 PM, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:
>
> I am but that is the night before Good Friday, so I suspect it won't work well for people to attend.
>
> **Bjorn E. Hansen, AICP CTP, CZO**
>
> Senior Planner – Long Range Planning | Planning Department
>
> T 704.283.3690
>
> bjorn.hansen@unioncountync.gov
>
> unioncountync.gov
>
> ***We're committed to excellent service.*** *Share your feedback in this short survey.*

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Public Records law and may be disclosed to third parties. If you are not the intended
recipient of this e-mail, please contact the sender immediately.

From: sdmerritt13 (null) <sdmerritt13@aol.com>
Sent: Monday, March 9, 2026 1:27 PM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: mark@gatewaydesigngroup.com; Alec Sithong <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Bjorn,

Would you be available for a meeting on April 2? That is a Thursday night 6 o'clock at Centerview Baptist Church in Marshville.

Steve Merritt

704-622-6030

Sent from my iPhone

> On Mar 9, 2026, at 8:14 AM, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:
>
> Steve,
>
> Thank you for the update.
>
> 1. Regarding the community meeting, I now have another rezoning meeting on March 30. I am still available on March 31 and April 1 though.

2. For payment, once you submit the application we can send an invoice through our Evolve review portal, but honestly it would be a lot easier if you delivered all paperwork in person so I can confirm everything is ok.
3. You can submit the petition and other meeting materials as part of the application. I can reference it in the staff report, but the community meeting in a few weeks would be the definitive one.
4. I can appreciate your frustration, and the good news is that the utility work you have done would have been required anyways, so you can move to implementation earlier than if you did the rezoning first and then the utility work. The rezoning will ideally be complete on June 1, but the Board of Commissioners has the option of approving the night of the hearing, which hopefully will be May 18.

Please let me know if you have any questions.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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Public Records law and may be disclosed to third parties. If you are not the intended
recipient of this e-mail, please contact the sender immediately.

From: Steve Merritt <sdmerritt13@aol.com>
Sent: Monday, March 9, 2026 8:06 AM
To: mark@gatewaydesigngroup.com; Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: 'Alec Sithong' <alec@studioone9.com>
Subject: Re: House of Pearls Rezoning Application

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Good Morning Bjorn,

Thank you for the information provided below. To recap, this has been quite a journey for the House of Pearls. I'd like to share some background since you haven't always participated in these meetings. We first met with Jim King in 2023, and he gave us a list of items needed to move forward. Following his direction, we held a community meeting at Centerview Baptist Church in Marshville, NC, which over 30 people attended. At this gathering, we presented our site plan, explained the ministry's mission, and hosted a Q&A session. Every attendee signed a petition supporting the project, though Mr. King mentioned the petition was merely hearsay.

To be honest, my frustration is considerable. However, I understand that all county rules, regulations, and codes must be followed before we can proceed. Thanks to your guidance, we are finally making progress. Our organization has served the community for nearly 20 years, helping women transition from the streets into a safe environment, where they can live sober lives and serve God.

I am the Chairman of the Board for His Perfect Love Ministries and the House of Pearls. I'll obtain the necessary

documentation from our Secretary/Treasurer and send it to you.

How should we handle the $1000.00 payment? Is there an option to pay online, or does someone need to deliver a physical check to your department?

I am working on arranging another meeting, possibly on Monday, March 30, at Centerview Baptist Church (2711 Old Pageland-Marshville Rd, Marshville, NC 28103) in their fellowship building. I will confirm this date with you as soon as the church approves the arrangements.

Best Regards,

Steve Merritt

Chairman of The Board of Directors

His Perfect Love Ministries

House of Pearls

704-622-6030

On Tuesday, March 3, 2026 at 02:14:27 PM EST, Bjorn Hansen <bjorn.hansen@unioncountync.gov> wrote:

> Mark,
>
> Here are my comments about the rezoning application:
>
> 1. The proposed zoning district would be Master Planned Development (MPD). I can change on the application form, so really an FYI.
> 2. Provide some sort of documentation

showing Steve's relationship to His Perfect Love Ministries, Inc. allowing him to submit an application.
3. There is an application fee of $1,000.
4. Regarding my earlier comments about prior community meeting documentation, we discussed internally and need a second meeting. The meeting can be in person or virtually. I have attached a sample community letter. Please propose some dates at least two weeks from now. My evening availability is March 23, 25, 26, 30, 31, April 1.

You do not need to go through another site plan review process. We can get you on the April 21 Land Use Board meeting, and then a public hearing with the Board of Commissioners May 18.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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Public Records law and may be disclosed to third parties. If you are not the intended
recipient of this e-mail, please contact the sender immediately.

From: mark@gatewaydesigngroup.com <mark@gatewaydesigngroup.com>
Sent: Tuesday, March 3, 2026 9:30 AM
To: Bjorn Hansen <bjorn.hansen@unioncountync.gov>
Cc: sdmerritt13@aol.com; 'Alec Sithong' <alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application

WARNING: This email originated from outside of Union County Government, be cautious when clicking on links or opening attachments.

Good morning Bjorn,

Wanted to confirm you have received all of the rezoning documents we sent last Friday?

Thanks!

Mark Diamond, P.E.

Project Manager

Gateway Design Group, PLLC

919-368-8867

8516 Foxbridge Drive

Weddington, NC 28104

From: mark@gatewaydesigngroup.com

<mark@gatewaydesigngroup.com>
Sent: Friday, February 27, 2026 1:10 PM
To: 'Bjorn Hansen'
<bjorn.hansen@unioncountync.gov>
Cc: sdmerritt13@aol.com; 'Alec Sithong'
<alec@studioone9.com>
Subject: RE: House of Pearls Rezoning Application
Importance: High

Good afternoon Bjorn,

I have attached documents for the rezoning application. Let us know the best way to pay the $1,000 fee and we will get that taken care of as well.

Please let us know if you need anything additional to make sure we are on the agenda for March.

Thanks!

Mark Diamond, P.E.

Project Manager

Gateway Design Group, PLLC

919-368-8867

8516 Foxbridge Drive

Weddington, NC 28104

From: Bjorn Hansen
<bjorn.hansen@unioncountync.gov>
Sent: Thursday, February 12, 2026 11:24 AM
To: sdmerritt13@aol.com;
mark@gatewaydesigngroup.com
Subject: House of Pearls Rezoning Application

Steve and Mark,

My apologies for any confusion. The application form is attached. You will also need to attached the sketch plan and a letter of intent. A letter of intent is you in your own words explaining the proposal. It would be helpful to include details about the proposal – number of residents, employees, activities on site, the fact an septic permit is already in hand, etc. The application fee is $1,000.

I advise you to drop off the forms in person because we can fix anything at that time. Please let me know if you have any questions.

Sincerely,

Bjorn

Bjorn E. Hansen, AICP CTP, CZO

Senior Planner – Long Range Planning | Planning Department

T 704.283.3690

bjorn.hansen@unioncountync.gov

unioncountync.gov

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Union County Government



500 North Main Street, Suite 70

Monroe, NC 28112

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BOCC Motions for Proposed Amendment to the Union County Zoning Map (CZ-2026-006)

The Union County Land Use Board recommended that the Union County Board of Commissioners _____ the (CZ-2026-006) and associated Master Planned Development Plan, submitted by Steve Merritt, requesting a revision of the Union County Zoning Map by rezoning an approximately 10.75 acre portion of one parcel of land totaling approximately 12.21 acres appearing on the tax map as tax parcel 02-226-017 along the south side of Camden Road from RA-40 to Master Planned Development and adoption of an associated Master Planned Development Plan.

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

Motion

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

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

Motion

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

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

The Union County Land Use Board recommended that the Union County Board of Commissioners _____ the rezoning petition (CZ-2026-006) and associated Master Planned Development Plan, submitted by Steve Merritt, requesting a revision of the Union County Zoning Map by rezoning an approximately 10.75 acre portion of one parcel of land totaling approximately 12.21 acres appearing on the tax map as tax parcel 02-226-017 along the south side of Camden Road from RA-40 to Master Planned Development and adoption of an associated Master Planned Development Plan.

CONSISTENCY AND REASONABLENESS STATEMENT FOR APPROVAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS CONSISTENT WITH THE CURRENT PLANS) (CZ-2026-006)

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

1. The proposed use under the amendment and MPD Plan is consistent with the Comprehensive Plan. The Comprehensive Plan's Land Use Map identifies this area as Rural Residential. The Comprehensive Plan provides that Rural Residential areas are identified for agricultural and low-density residential development patterns. This map amendment and associated MPD Plan do not increase the density of development from an overall low density residential development.
2. The use, proposed rezoning, and associated MPD Plan comply with the standards for a Master Planned Development set forth in Section 20.020 of the UDO. The development would be difficult to carry out in the planned time frame otherwise under the applicable zoning regulations. It further provides greater public benefits than could be achieved using conventional zoning regulations. The proposed use under the rezoning and associated MPD Plan promotes, without limitation, flexibility and creativity in responding to changing social, economic, and market conditions through providing group home and recovery housing (which responds to changing social and economic conditions compared to many traditional housing models such as single-family housing).
3. The development will result in public benefits that are equal to or greater than those that would have resulted from development under conventional zoning (non-Master Planned Development) regulations. Specifically, the Master Planned Development proposed will provide a public benefit of allowing development of a group home that may provide a community service that would not be able to be developed in such a manner using conventional zoning regulations.

4. There are appropriate terms and conditions imposed to protect the interests of surrounding property owners and residents, existing and future residents of the Master Planned Development, and the general public. These conditions include, without limitation, agreement on adherence to a site plan that takes into account the impacts of the use and imposes conditions on the number of residents (which will reduce any impacts to neighboring properties).
5. Group home facilities are allowed in the existing zoning district, RA-40 under the UDO with a special use permit. However, utilizing the special use permit method under the UDO would require implementation within one year. This rezoning and associated MPD Plan would allow for flexibility to develop the property over a longer period in a manner that would otherwise already be allowed on the property through the special use permit process.
6. The use set forth under the conditions would meet Union County development standards.
7. The tract of land is not overly small for the general area in which it is located and is reasonable in size for the use contemplated.
8. The immediate surrounding properties are zoned for residential uses, which is similar to the use proposed under this rezoning and associated MPD Plan for a residential use as a group home.
9. The benefits to the community at large, the neighbors, and the property owners of the proposed rezoning outweigh any detriments to the neighbors and others caused by the rezoning. The benefits of this rezoning include increasing group living and recovery opportunities in Union County. The potential detriments of the use established by this rezoning include any increased noise, light, and traffic exposure resulting from the proposed use that could affect nearby properties.

CONSISTENCY AND REASONABLENESS STATEMENT FOR DENIAL OF THE PROPOSED AMENDMENT (THE PROPOSAL IS INCONSISTENT WITH THE CURRENT PLANS) (CZ-2026-006)

Pursuant to N.C.G.S. § 160D-605 and the Unified Development Ordinance of Union County, North Carolina (the "UDO"), the Union County Board of Commissioners (the "Board") does hereby find and determine that the proposed map amendment and associated Master Planned Development Plan (the "MPD Plan") are inconsistent with the Union County Comprehensive Plan (the "Comprehensive Plan"), and that denial of the proposed map amendment and associated MPD Plan is reasonable and in the public interest because:

1. The proposed rezoning and associated MPD Plan could facilitate ongoing and potential future higher density group living uses in close proximity to existing residential uses. Higher density residential uses are inconsistent with low-density development contemplated for Rural Residential areas identified by the Comprehensive Plan (the proposed development is located in a Rural Residential area in the Comprehensive Plan).
2. Allowing group home use on the property could result in increased congestion on the roads and streets adjacent and nearby to the property. Traffic congestion is a noted concern in the Comprehensive Plan.
3. The proposed use under the amendment and the MPD Plan is also inconsistent with the Rural Land Use Plan as it could potentially allow for future higher-density residential development and other group homes in the area, which is identified as rural for purposes of the Rural Land Use Plan.
4. The use, proposed rezoning, and associated MPD Plan do not comply with the standards for a Master Planned Development set forth in Section 20.020 of the UDO. A group home development is allowed to be carried out in the existing zoning district with a special use permit; thus, it is not difficult or impossible to carry out such a group home development under the applicable zoning regulations. Given that a group home may be developed with the existing zoning with a special use permit, there would not be greater public benefits than could be achieved using conventional zoning regulations.
5. The terms and conditions proposed to be imposed do not sufficiently protect the interests of surrounding property owners and residents, existing and future residents of the Master Planned Development, and the general public. There could be additional restrictions imposed on the use and numbers of residents which would ensure such sufficient protection that are not set forth in the proposed rezoning and associated MPD Plan.

ORDINANCE APPROVING REVISION TO THE OFFICIAL ZONING MAP OF UNION COUNTY, NORTH CAROLINA AND ASSOCIATED MASTER PLANNED DEVELOPMENT PLAN

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

WHEREAS, Union County has received a rezoning petition (CZ-2026-006), submitted by Steve Merritt, requesting a revision of the Union County Zoning Map by rezoning an approximately 10.75 acre portion of one parcel of land totaling approximately 12.21 acres appearing on the tax map as tax parcel 02-226-017 along the south side of Camden Road from RA-40 to Master Planned Development (the "Rezoning Petition"); and

WHEREAS, there is also a request to adopt a Master Planned Development Plan associated with the Rezoning Petition ("MPD Plan"); and

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

WHEREAS, the Board has determined that approval of the Rezoning Petition and rezoning the subject parcel from RA-40 to Master Planned Development (MPD), along with approval of the MPD Plan, is reasonable and in the public interest, including for those reasons set forth in the contemporaneously adopted consistency and reasonableness statement.

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

1. The Zoning Map is hereby amended by rezoning the 10.75 acre portion of the parcel appearing on the tax map as tax parcel 02-226-017 located along the south side of Camden Road from RA-40 to Master Planned Development (MPD).

2. The MPD Plan is hereby approved.

3. The conditions accepted by the Applicant are hereby approved and incorporated into the Master Planned Development (MPD) rezoning of the parcel.

4. The Board incorporates the considerations related to the Rezoning Petition and MPD Plan, as contemplated by Section 80.100 of the UDO, as set forth in the contemporaneously adopted consistency and reasonableness statement, into this ordinance by reference.

5. This ordinance is effective upon adoption.

Adopted this _____ day of _____, 2026.

_____
Brian Helms
Chair, Union County Board of Commissioners

File #: 26-258 **Agenda Date:** 5/18/2026

TITLE:

Contract - NCDOT Project U-4714AC (SR 1009 Old Monroe Road) - Utility PE and Construction Agreement

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 North Carolina Department of Transportation (NCDOT) 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 (UCW) Capital Improvement Program (CIP) includes an allocation for the design and construction of water line and sewer line betterments related to NCDOT's multi-phase project for the widening of Old Monroe Road. This agreement with NCDOT is for the phase of the Old Monroe Road widening project from the Mecklenburg County line to near Morningside Meadows Lane. The water line betterments will increase the existing 6-inch and 8-inch water lines to 12-inch and 16-inch water lines to provide sufficient fire flow and pressure to meet future demand. The sewer line betterments will replace the existing 4-inch and 6-inch septic tank effluent gravity (STEG) wastewater collection system with standard 8-inch gravity sewer lines.

The water and sewer betterments will be administered by NCDOT as part of the Old Monroe Road widening project. UCW will be responsible for reimbursing NCDOT for the betterment costs in a not to exceed amount of $1,359,307.81.

FINANCIAL IMPACT:

Funding is available within the adopted account 60185527 - 853 West Zone Transmission Main Phase 4 to support the contract amount of $1,359,307.81.

ACCOUNTS RECEIVABLE AGREEMENTS

REMITTANCE GUIDANCE

_____ : I acknowledge that upon execution of this Agreement, we will be required to submit a down payment, if required. I also acknowledge that we may pre-pay any portion of the estimated cost noted in this Agreement, prior to final billing by the Department.

Please refer to your Agreement's PAYMENT TERMS to correctly remit any payment due to the Department.

PAYMENT TERMS	PAYMENT TIMING
PAYMENT UPON AGREEMENT EXECUTION	Please submit the amount of agreed upon payment via one of the below methods, once you have received notice of execution of the Agreement.
PAYMENT PRIOR TO LETTING (OR START OF PHASE)	You will be notified by the Project Manager when payment will be due. Please remit payment within 60 days of notification.
PAYMENT UPON BILLING	The Department will bill at the completion of the Project (or when defined in the Agreement). All payments are due within 60 days of invoicing.

NOTE: You may pre-pay any portion of an estimated cost, prior to Departmental Billing. The Department will adjust final billing to account for any pre-payments made.

LATE PAYMENTS AND INTEREST RATES:

For payments not received within 60 days, the Department must charge a statutory interest rate of prime plus one percent (1%) on all Utility Relocation Agreements. For any other Receivable Agreement, the Department may charge a late fee and/or interest.

PAYMENT METHODS

1. SEND PAYMENT BY CHECK

MAIL TO:
NCDOT – Accounts Receivable
1514 Mail Service Center
Raleigh, NC 27699-1514

INCLUDE:
- Agreement ID (10000xxxxx)
- WBS Element

OR

2. SEND PAYMENT VIA ACH
(Automated Clearinghouse)

Initiate ACH through your bank* and send an e-mail to:
- ✓ Shamorah Fountain – sfountain1@ncdot.gov
- ✓ Melinda Neighbors – mneighbors@ncdot.gov

INCLUDE:
- Agreement ID (10000xxxxx)
- WBS Element
- Amount of Payment

*If you need NCDOT's Account Information, contact Tammy Court at tlcourt@ncdot.gov

Failure to follow the above steps and remit payment per the terms in the Agreement may result in delays to project delivery. Please contact your Division Project Manager for questions regarding payment terms.

AGREEMENT OVERVIEW

NORTH CAROLINA
UNION COUNTY

DATE: 3/18/2026

PARTIES TO THE AGREEMENT:

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

AND

UNION COUNTY

PROJECT NUMBERS:

TIP #: U-4714AC

WBS ELEMENTS: PE 39078.1.2
CON 39078.3.9

The purpose of this Agreement is to identify the participation in project costs, project delivery and/or maintenance, by the other party to this Agreement, as further defined in this Agreement.

SCOPE OF PROJECT ("Project"): This Project consists of sewer line betterments related to widening SR 1009 (John Street / Old Monroe Road) to multi-lanes from east of I-485 to west of Morningside Meadow Lane.

ESTIMATED COST TO OTHER PARTY: $ 1,359,307.81
ESTIMATED COST TO OTHER PARTY (PE): $ 65,000.00
ESTIMATED COSTS TO OTHER PARTY (CON): $ 1,294,307.81

PAYMENT TERMS: Union County will submit payment upon execution of agreement.

MAINTENANCE: Union County is responsible for all utility maintenance.

EFFECTIVE DATES OF AGREEMENT:
START: Upon Full Execution of this Agreement
END: When work is complete and all terms are met.

This **Agreement** is made and entered into on the last date executed below, by and between the North Carolina Department of Transportation, an agency of the State of North Carolina, hereinafter referred to as the **Department** and Union County, hereinafter referred to as the **County**; and collectively referred to as the **Parties**.

The **Parties** to this Agreement, listed above, intend that this Agreement, together with all attachments, schedules, exhibits, and other documents that both are referenced in this Agreement and refer to this Agreement, represents the entire understanding between the **Parties** with respect to its subject matter and supersedes any previous communication or agreements that may exist.

I. WHEREAS STATEMENTS

WHEREAS, this Agreement is made under the authority granted to the **Department** by the North Carolina General Assembly under General Statutes of North Carolina (NCGS), particularly Chapter 136-27.1 and 136-27.3; and,

WHEREAS, the **Department** has plans to make certain street and highway constructions and/or traffic control improvements; and,

WHEREAS, the **County** has requested that the **Department** perform work or provide services; and,

WHEREAS, the **Parties** hereto wish to enter into an agreement for scoped work to be performed or provided by the **Department** (including construction, reviews, goods, or services) with reimbursement for the costs thereof by the **County** as hereinafter set out; and,

WHEREAS, the **Department** and the **County** have agreed that the jurisdictional limits of the **Parties**, as of the date of entering the agreement for the above-mentioned project, are to be used in determining the duties, responsibilities, rights, and legal obligations of the **Parties** hereto for the purposes of this Agreement.

NOW, THEREFORE, this Agreement states the promises and undertakings of each party as herein provided, and the **Parties** do hereby covenant and agree, each with the other, as follows:

II. RESPONSIBILITIES

A. DEPARTMENT

The **Department** shall be responsible for all phases of project delivery to include utility relocation, and construction, and/or maintenance as shown in the **PROJECT DELIVERY REQUIREMENTS** Provision.

B. COUNTY

The **County** shall be responsible for maintenance as shown in the **PROJECT DELIVERY REQUIREMENTS** Provision and payment as shown in the **COSTS AND FUNDING** Provision.

III. PROJECT DELIVERY REQUIREMENTS

A. PRELIMINARY ENGINEERING

i. At the request of the **County**, the **Department** will provide design services for the required relocation and/or betterment of the **County's** utility lines as affected by Project U-4714AC. The work is described as follows: Utility design for sewer line betterment.

ii. The **Department** will ensure the design of municipal utility relocation is performed by professional engineering services. If the **Department** revises highway plans, then the **County** reserves the right to re-engineer relocation plans.

iii. Upon the satisfactory completion of the utility construction plans covered under this Agreement, the **County** shall review and approve the plans, the associated estimated utility construction cost, and special provisions to be made part of the **Department's** roadway contract for highway construction. The **County** shall release the **Department** of any future responsibility for the design of the utility construction plans. Said releases shall be deemed to be given by the **County** upon completion of the plans, estimate, special provisions and acceptance by the **Department** and **County** for the plans to be made part of the highway contract.

B. CONSTRUCTION

i. At the request of the **County** the **Department** shall place provisions in the construction contract for Project U-4714AC, for the contractor to adjust and relocate utility lines and/or provide betterment. The work is described as follows: Sewer line betterment.

ii. Said work shall be accomplished in accordance with plan sheets, attached hereto as Exhibit "A", cost estimate attached hereto as Exhibit "B", and project specific provisions, if applicable, attached hereto as Exhibit "C".

iii. The Department's Standard Special Provisions binds the contractor to guarantee materials and workmanship against latent and patent defects arising from faulty materials, faulty workmanship or negligence for a period of twelve months following the date of final acceptance of the work for maintenance and shall replace such defective materials and workmanship without cost to the **Department**. The highway contractor will not be responsible for damage due to faulty design, normal wear and tear, for negligence on the part of the **Department**, and/or for use in excess of the design. Where items of material carry a manufacturer's guarantee for any period in excess of twelve months, then the manufacturer's guarantee shall apply to that particular piece of material. Appropriate provisions of the payment and/or performance bonds shall cover this guarantee for the project. Should any failure result from the conditions found in this section the **Department** would then enter into a Contract with the **County** for reimbursement to be made to the **County** for necessary repairs performed by the **County** and/or its contractor. The Utility Relocation Agreement would be issued by the NCDOT Utilities Unit and the repairs would be coordinated between the **County** and the Department's assigned Resident Engineer.

C. MAINTENANCE AND OPERATIONS

i. Upon satisfactory completion of the utility relocations and successful placement of the utility lines into service, the **County** shall assume responsibility for the normal maintenance and operation of the utility lines. Upon completion of the construction of the

highway project, the **County** shall release the **Department** from any and all claims for damages in connection with adjustments made to its utility lines; and, further, the **County** shall release the **Department** of any future responsibility for the cost of maintenance to said utility lines. The **Department** will invite the **County** to the Final Inspection meeting with its contractor and will include the **County** in the project acceptance notification. Said releases shall be deemed to be given by the **County** upon completion of construction of the project and its acceptance by the **Department** from its contractor unless the **County** notifies the **Department**, in writing, to the contrary prior to the **Department's** acceptance of the project.

ii. The **County** obligates itself to service and to maintain its facilities to be retained and installed over and along the highway within the **Department's** right-of-way limits in accordance with Paragraph B. i., the mandate of the North Carolina General Statutes and such other laws, rules, and regulations as have been or may be validly enacted or adopted, now or hereafter.

iii. If at any time the **Department** shall require the removal of or changes in the location of the encroaching facilities which are being relocated at the **County's** expense, the **County** binds itself, its successors and assigns, to promptly remove or alter said facilities, in order to conform to the said requirement (if applicable per G.S. 136-27.1), without any cost to the **Department**.

IV. COSTS AND FUNDING

A. PROJECT COSTS

i. The **County** shall be responsible for relocation, and/or betterment, costs for utility work as shown on the attached Exhibit "A". The estimated cost to the **County** is $1,359,307.81 as shown on the attached Exhibit "B". Upon request by the **County**, the **Department** will provide the **County** with an updated estimate of the utility work based on the bid amounts in the awarded highway contract.

ii. It is understood by both **Parties** that this is an estimated cost for the utility work described in this Agreement and is subject to change.

iii. If the **County** does not approve the anticipated cost increases, the **Department** will cease work on the Project. Any funding provided by the **County** that is unused will be returned to the **County**.

iv. A supplemental agreement will be generated to document increased cost participation by the **County**. The **County** shall not unreasonably withhold consent to amending this agreement to account for documented cost increases.

B. PAYMENT BY THE COUNTY

i. Based on the estimated cost of $1,359,307.81, the **County** shall submit payment for $1,359,307.81 to the **Department's** Fiscal Section upon full execution of this Agreement in accordance with the attached "Remittance Guidance".

ii. Any cost incurred due to additional utility work requested by the **County** after award of the construction contract, shall be solely the responsibility of the **County**. The **County** shall reimburse the **Department** 100% of the additional utility cost.

iii. Upon completion of the Project, if actual costs of the Additional Work exceeds the amount of the down payment, the **County** shall reimburse the **Department** any underpayment within sixty (60) days of invoicing by the **Department**. The **Department** will charge a late payment penalty and interest on any unpaid balance due in accordance with G. S. 147-86.23. If the actual cost of the work is less than $1,359,307.81, the **Department** will reimburse the **County** any overpayment.

V. STANDARD PROVISIONS

A. AGREEMENT MODIFICATIONS

Any modification to scope, funding, responsibilities, or time frame will be agreed upon by all **Parties** by means of a written supplemental agreement.

B. ASSIGNMENT OF RESPONSIBILITIES

The **Department** must approve any assignment or transfer of the responsibilities of the **County** set forth in this Agreement to other parties or entities.

C. AGREEMENT FOR IDENTIFIED PARTIES ONLY

This Agreement is solely for the benefit of the identified **Parties** to the Agreement and is not intended to give any rights, claims, or benefits to third parties or to the public at large.

D. OTHER AGREEMENTS

The **County** is solely responsible for all agreements, contracts, and work orders entered into or issued by the **County** to meet the terms of this Agreement. The **Department** is not responsible for any expenses or obligations incurred for the terms of this Agreement except those specifically eligible for the funds and obligations as approved by the **Department** under the terms of this Agreement.

E. TITLE VI

The other party to this Agreement shall comply with Title VI of the Civil Rights Act of 1964 (Title 49 CFR, Subtitle A, Part 21) and related nondiscrimination authorities. Title VI and related authorities prohibit discrimination on the basis of race, color, national origin, disability, gender, and age in all programs or activities of any recipient of Federal assistance.

F. AUTHORIZATION TO EXECUTE

The **Parties** hereby acknowledge that the individual executing this Agreement has read this Agreement, conferred with legal counsel, fully understands its contents, and is authorized to execute this Agreement and to bind the respective **Parties** to the terms contained herein.

G. DEBARMENT POLICY

It is the policy of the **Department** not to enter into any agreement with parties that have been debarred by any government agency (Federal or State). By execution of this agreement, the **County** certifies that neither it nor its agents or contractors are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any Federal or State Agency or Department and that it will not enter into agreements with any entity that is debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction.

H. INDEMNIFICATION

To the extent authorized by state and federal statutes, the **County** will indemnify and hold harmless the FHWA (if applicable), the **Department** and the State of North Carolina, their respective officers, directors, principals, employees, agents, successors, and assigns from and against any and all claims for damage and/or liability, including those that may be initiated by third parties, in connection with the Project activities performed pursuant to this Agreement including construction of the Project, except for those claims arising out of the errors, omissions, or negligence of the **Department**, its respective officers, directors, principals, employees, agents, successors, and assigns.

I. AVAILABILITY OF FUNDS

All terms and conditions of this Agreement are dependent upon, and, subject to the allocation of funds for the purpose set forth in the Agreement and the Agreement shall automatically terminate if funds cease to be available.

J. COUNTERPARTS AND ELECTRONIC SIGNATURES

i. This Agreement, and other documents to be delivered pursuant to this Agreement, may be executed in one or more counterparts, each of which will be deemed to be an original copy and all of which, when taken together, will be deemed to constitute one and the same

agreement or document and will be effective when counterparts have been signed by each of the **Parties**. An image of a manual signature on this Agreement, or other documents to be delivered pursuant to this Agreement, will constitute an original signature for all purposes. The delivery of copies of this Agreement or other documents to be delivered pursuant to this Agreement, including executed signature pages where required, by electronic transmission will constitute effective delivery of this Agreement or such other document for all purposes.

ii. The **Parties** hereto further acknowledge and agree that this Agreement may be signed and/or transmitted by email or a PDF document or using electronic signature technology (e.g. DocuSign, Adobe Sign, or other electronic signature technology), and that such signed record shall be valid and as effective to bind the **Party(ies)** so signing as a paper copy bearing a handwritten signature. By selecting "I Agree", "I Accept", or other similar item, button, or icon via use of a keypad, mouse, or other device, as part of the electronic signature technology, the **Parties** consent to be legally bound by the terms and conditions of Agreement and that such act constitutes a signature as if actually signed in writing. The **Parties** also agree that no certification authority or other third-party verification is necessary to validate its electronic signature and that the lack of such certification or third-party verification will not in any way affect the enforceability of its electronic signature; however, each **Party** agrees to maintain certification records and will produce said records upon request. The **Parties** acknowledge and agree that delivery of a copy of this Agreement or any other document contemplated hereby through the electronic signature technology, will have the same effect as physical delivery of the paper document bearing an original written signature.

K. GIFT BAN

By Executive Order 24, issued by Governor Perdue, and NCGS 133-32, it is unlawful for any vendor or contractor (i.e. architect, bidder, contractor, construction manager, design professional, engineer, landlord, offeror, seller, subcontractor, supplier, or vendor), to make gifts or to give favors to any State employee of the Governor's Cabinet Agencies (i.e. Administration, Adult Corrections, Commerce, Environmental Quality, Health and Human Services, Information Technology, Military and Veterans Affairs, Natural and Cultural Resources, Public Safety, Revenue, Transportation, and the Office of the Governor).

SIGNATURE PAGE

IN WITNESS WHEREOF, this Agreement has been executed the day and year heretofore set out, on the part of the **Department** and the **County** by authority duly given.

(DOCUSIGN ONLY)

UNION COUNTY

Authorized Signer: _____ Print Name: _____

Date Signed: _____ Title: _____

Approved as to Legal Form: BTI

If applicable, this Agreement has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act:

Finance Signer: _____ Print Name: _____

Date Signed: _____ Title: _____

Fed Tax ID No: _____

Remittance Address: _____

Purchase Order, Ref. No., etc.:

_____

Accounts Payable Contact:

Name: _____

Email: _____

Phone Number: _____

DEPARTMENT OF TRANSPORTATION

By: _____ Print Name: _____

Date: _____ Title: _____

APPROVED BY BOARD OF TRANSPORTATION ITEM O: _____ (DATE)

SIGNATURE PAGE

IN WITNESS WHEREOF, this Agreement has been executed the day and year heretofore set out, on the part of the **Department** and the **County** by authority duly given.

UNION COUNTY (INK SIGNATURES)

Attest:

By: _____

Title: _____

Authorized Signer: _____

Print Name: _____

Title: _____

Date Signed: _____

If applicable, this Agreement has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act:

Fed Tax ID No: _____

Remittance Address:

_____

_____

Finance Signer: _____

Print Name: _____

Title: _____

Date Signed: _____

Purchase Order, Ref. No., etc.:

_____

Accounts Payable Contact:

Name: _____

Email: _____

Phone Number: _____

DEPARTMENT OF TRANSPORTATION (DOCUSIGN)

By: _____

Date: _____

Print Name: _____

Title: _____

APPROVED BY BOARD OF TRANSPORTATION ITEM O: _____ (DATE)

09/08/99

CONTRACT: TIP PROJECT: U-4714AC

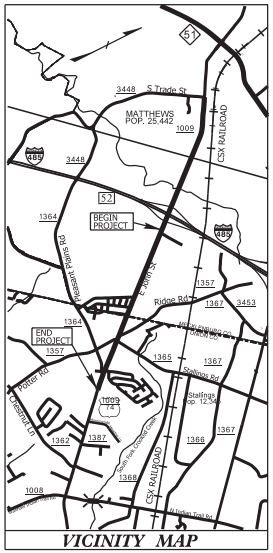
STATE OF NORTH CAROLINA
DIVISION OF HIGHWAYS

UTILITIES CONSTRUCTION PLANS
MECKLENBURG & UNION COUNTY

T.I.P. NO.	SHEET NO.
U-4714AC	UC-1

NOTE:
ALL UTILITY WORK SHOWN ON THIS SHEET WILL BE DONE BY OTHERS. NO PAYMENT WILL BE MADE TO THE CONTRACTOR FOR UTILITY WORK SHOWN ON THIS SHEET.

LOCATION: SR 1009 (JOHN STREET\OLD MONROE ROAD)
FROM EAST OF I-485 INTERCHANGE TO
WEST OF MORNINGSIDE MEADOW LANE
TYPE OF WORK: RELOCATION OF WATER & SEWER LINES



VICINITY MAP

STATE COST (CAROLINA WATER SERVICE, INC. OF NORTH CAROLINA)
STATE COST (UNION COUNTY WATER)
STATE COST (UNION COUNTY SEWER)
BET1 COST (UNION COUNTY)

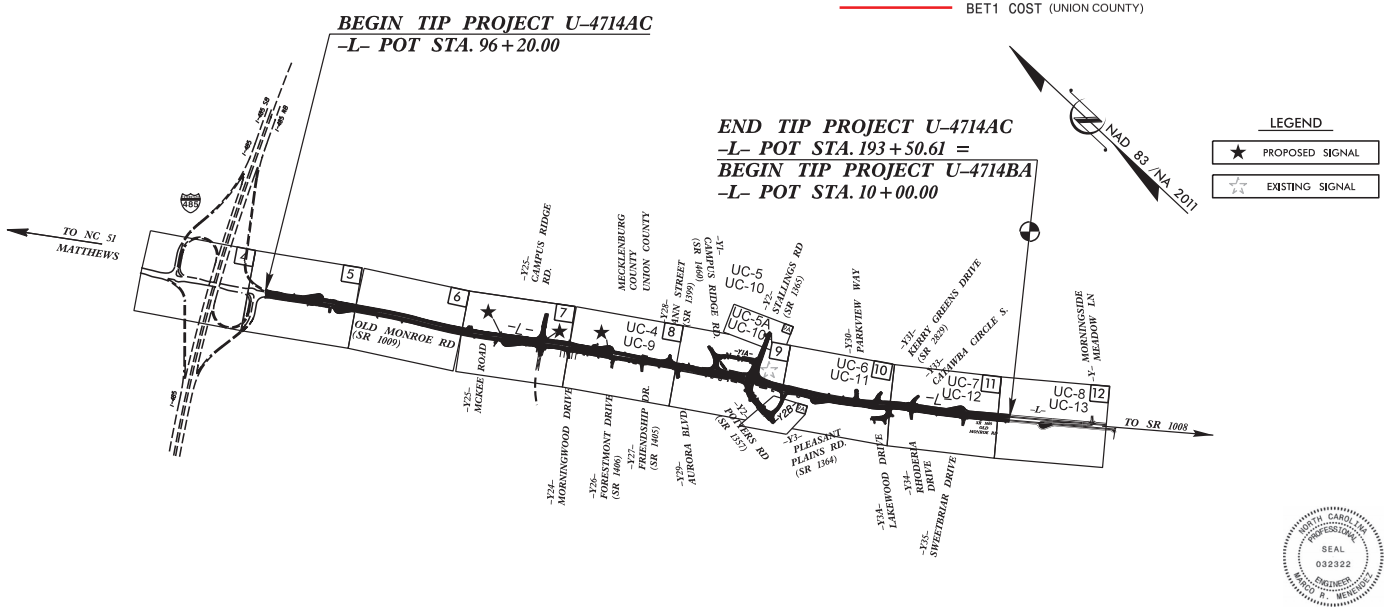
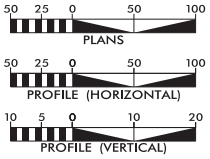


EXHIBIT A

UC AGREEMENT PLAN FOR U-4714AC

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO R. MENENDEZ

GRAPHIC SCALES



INDEX OF SHEETS

SHEET NO.:	DESCRIPTION:
UC-1	TITLE SHEET
UC-2	UTILITY SYMBOLOGY
UC-3	PROJECT NOTES
UC-3A THRU UC-3I	DETAIL SHEETS
UC-4 THRU UC-8	WATER LINE PLAN SHEETS
UC-9 THRU UC-13	SEWER LINE PLAN SHEETS
UC-14 THRU UC-22	WATER LINE PROFILE SHEETS
UC-23 THRU UC-24	SEWER LINE PROFILE SHEETS

WATER AND SEWER OWNER ON PROJECT

WATER - CAROLINA WATER SERVICE, INC. OF NORTH CAROLINA
WATER - UNION COUNTY
SEWER - UNION COUNTY

PREPARED IN THE OFFICE OF:
KCI Associates of N.C., P.A.
4800 Falls of Neuse Road, Suite 200
Raleigh, NC 27609
Phone (919) 783-9214
Fax (919) 783-9266
http://www.kci.com

MARCO MENENDEZ - PROJECT MANAGER (UTILITY CONSTRUCTION)
ANGELICA PURA - PROJECT DESIGNER (UTILITY CONSTRUCTION)

DIVISION OF HIGHWAYS
UTILITIES UNIT
1555 MAIL SERVICES CENTER
RALEIGH NC 27699-1555
PHONE (919) 707-6690
FAX (919) 250-4151

DONALD E. HAMPTON - REGIONAL UTILITY ENGINEER
JONG T. YOON, PE - SENIOR UTILITY ENGINEER
DAYTON C. MARTIN, III - REGIONAL UTILITY COORDINATOR

$$$$$$$$$$SYSTIME$$$$$$$$$$
$$$$$$$$$$DGN$$$$$$$$$$
$$$$$$$$$$USERNAME$$$$$$$$$$

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-2

STATE OF NORTH CAROLINA
DIVISION OF HIGHWAYS

UTILITIES PLAN SHEET SYMBOLS

PROPOSED WATER SYMBOLS

- Water Line (Sized as Shown) — 12" WL
- 11¼ Degree Bend
- 22½ Degree Bend
- 45 Degree Bend
- 90 Degree Bend
- Plug
- Tee
- Cross
- Reducer
- Gate Valve — GV
- Butterfly Valve — BV
- Tapping Valve — TGV
- Line Stop — LS
- Line Stop with Bypass — LS/BP
- Blow Off — BO
- Fire Hydrant — PFH
- Relocate Fire Hydrant — REH
- Remove Fire Hydrant — REM FH
- Water Meter — PWM
- Relocate Water Meter — RWM
- Remove Water Meter — REM WM
- Water Pump Station — PSTN
- RPZ Backflow Preventer — PRPZ
- DCV Backflow Preventer — PBFP
- Relocate RPZ Backflow Preventer — RRPZ
- Relocate DCV Backflow Preventer — RBFP

PROPOSED MISCELLANOUS UTILITIES SYMBOLS

- Power Pole
- Telephone Pole
- Joint Use Pole
- Telephone Pedestal — "TI"–"TP"
- Utility Line by Others (Type as Shown) — PROP D/M POW LINES
- Trenchless Installation — 12" TL INSTALL
- Encasement by Open Cut — 24" RWCAS BY OC
- Encasement — 24" ENCASEMENT
- Thrust Block
- Air Release Valve — AR
- Utility Vault — UV
- Concrete Pier — CP
- Steel Pier — SP
- Plan Note — NOTE
- Pay Item Note — PAY ITEM

EXISTING UTILITIES SYMBOLS

- Power Pole
- Telephone Pole
- Joint Use Pole
- Utility Pole
- Utility Pole with Base
- H-Frame Pole
- Power Transmission Line Tower
- Water Manhole
- Power Manhole
- Telephone Manhole
- Sanitary Sewer Manhole
- Hand Hole for Cable
- Power Transformer
- Telephone Pedestal
- CATV Pedestal
- Gas Valve
- Gas Meter
- Located Miscellaneous Utility Object
- Abandoned According to Utility Records — AATUR
- End of Information — E.O.I.
- *Underground Power Line
- *Underground Telephone Cable
- *Underground Telephone Conduit
- *Underground Fiber Optics Telephone Cable
- *Underground TV Cable
- *Underground Fiber Optics TV Cable
- *Underground Gas Pipeline
- Aboveground Gas Pipeline — A/G Gas
- *Underground Water Line
- Aboveground Water Line — A/G Water
- *Underground Gravity Sanitary Sewer Line — SS
- Aboveground Gravity Sanitary Sewer Line — A/G Sanitary Sewer
- *Underground SS Forced Main Line
- Underground Unknown Utility Line
- SUE Test Hole
- Water Meter
- Water Valve
- Fire Hydrant
- Sanitary Sewer Cleanout

*For Existing Utilities

- Utility Line Drawn from Record (Type as Shown)
- Designated Utility Line (Type as Shown)

REV: 2/1/2012

5/14/99

05-SEP-2025 14:52
J:\2417043\03-UC\U-4714AC\Water and Wastewater\U-4714AC_ut_rdy_UC02.psh-dgn
$$$$USERNAME$$$$

8/17/99

UTILITY CONSTRUCTION

GENERAL NOTES:

1. THE PROPOSED UTILITY CONSTRUCTION SHALL MEET THE APPLICABLE REQUIREMENTS OF THE NC DEPARTMENT OF TRANSPORTATION'S "STANDARD SPECIFICATIONS FOR ROADS AND STRUCTURES" DATED JANUARY 2024.

2. THE EXISTING WATER AND SEWER UTILITIES BELONG TO UNION COUNTY AND CAROLINA WATER SERVICE.

3. ALL WATER LINES TO BE INSTALLED WITHIN COMPLIANCE OF THE RULES AND REGULATIONS OF THE NORTH CAROLINA DEPARTMENT OF ENVIRONMENTAL QUALITY, DIVISION OF WATER RESOURCES, AND PUBLIC WATER SUPPLY SECTION. ALL SEWER LINES TO BE INSTALLED WITHIN COMPLIANCE OF THE RULES AND REGULATIONS OF THE NORTH CAROLINA DEPARTMENT OF ENVIRONMENT QUALITY, DIVISION OF WATER RESOURCES, AND WATER QUALITY SECTION. PERFORM ALL WORK IN ACCORDANCE WITH THE APPLICABLE PLUMBING CODES.

4. THE UTILITY OWNER OWNS THE EXISTING UTILITY FACILITIES AND WILL OWN THE NEW UTILITY FACILITIES AFTER ACCEPTANCE BY THE DEPARTMENT. THE DEPARTMENT OWNS THE CONSTRUCTION CONTRACT AND HAS ADMINISTRATIVE AUTHORITY. COMMUNICATIONS AND DECISIONS BETWEEN THE CONTRACTOR AND UTILITY OWNER ARE NOT BINDING UPON THE DEPARTMENT OR THIS CONTRACT UNLESS AUTHORIZED BY THE ENGINEER. AGREEMENTS BETWEEN THE UTILITY OWNER AND CONTRACTOR FOR THE WORK THAT IS NOT PART OF THIS CONTRACT OR IS SECONDARY TO THIS CONTRACT ARE ALLOWED, BUT ARE NOT BINDING UPON THE DEPARTMENT.

5. PROVIDE ACCESS FOR THE DEPARTMENT PERSONNEL AND THE OWNER'S REPRESENTATIVES TO ALL PHASES OF CONSTRUCTION. NOTIFY DEPARTMENT PERSONNEL AND THE UTILITY OWNER TWO WEEKS PRIOR TO COMMENCEMENT OF ANY WORK AND ONE WEEK PRIOR TO SERVICE INTERRUPTION. KEEP UTILITY OWNERS' REPRESENTATIVES INFORMED OF WORK PROGRESS AND PROVIDE OPPORTUNITY FOR INSPECTION OF CONSTRUCTION AND TESTING.

6. MAKE FINAL CONNECTIONS OF THE NEW WORK TO THE EXISTING SYSTEM WHERE INDICATED ON THE PLANS, AS REQUIRED TO FIT THE ACTUAL CONDITIONS, OR AS DIRECTED.

7. THE PLANS DEPICT THE BEST AVAILABLE INFORMATION FOR THE LOCATION, SIZE, AND TYPE OF MATERIAL FOR ALL EXISTING UTILITIES. MAKE INVESTIGATIONS FOR DETERMINING THE EXACT LOCATION, SIZE, AND TYPE MATERIAL OF THE EXISTING FACILITIES AS NECESSARY FOR THE CONSTRUCTION OF THE PROPOSED UTILITIES AND FOR AVOIDING DAMAGE TO EXISTING FACILITIES. REPAIR ANY DAMAGE INCURRED TO EXISTING FACILITIES TO THE ORIGINAL OR BETTER CONDITION AT NO ADDITIONAL COST TO THE DEPARTMENT.

8. MAKE CONNECTIONS BETWEEN EXISTING AND PROPOSED UTILITIES AT TIMES MOST CONVENIENT TO THE PUBLIC, WITHOUT ENDANGERING THE UTILITY SERVICE, AND IN ACCORDANCE WITH THE UTILITY OWNER'S REQUIREMENTS. MAKE CONNECTIONS ON WEEKENDS, AT NIGHT, AND ON HOLIDAYS IF NECESSARY.

9. ALL UTILITY MATERIALS SHALL BE APPROVED PRIOR TO DELIVERY TO THE PROJECT. SEE 1500-7 -, " SUBMITTALS AND RECORDS" IN SECTION 1500 OF THE STANDARD SPECIFICATIONS.

PROJECT SPECIFIC NOTES: UNION COUNTY

1. ALL CONSTRUCTED AND PROPOSED WATER LINES TO BE TESTED PER UNION COUNTY WATER, NCDOT, AND NCDEQ STANDARD SPECIFICATIONS.

2. THE UTILITY OWNER OWNS THE EXISTING UTILITY FACILITIES AND WILL OWN THE NEW UTILITY FACILITIES AFTER ACCEPTANCE BY UNION COUNTY WATER REPRESENTATIVE.

3. IF THE PROPOSED WATER AND/OR SANITARY SEWER MAIN IS INSTALLED WITHIN 12" IN ANY DIRECTION (VERTICALLY OR HORIZONTALLY) OF A GAS MAIN THEN THE CONTRACTOR SHALL CALL PIEDMONT NATURAL GAS COMPANY AT (704) 525-5585 AND INFORM THEM.

4. THE CONTRACTOR SHALL USE EROSION CONTROL MEASURES, AS DIRECTED.

5. IF ADDITIONAL WORK SPACE IS NEEDED, AN ENCROACHMENT IS TO BE AGREED UPON BETWEEN THE CONTRACTOR, NCDOT, AND THE PROPERTY OWNER.

6. CONCRETE THRUST BLOCKING, WALL BLOCKING, RODDING, OR OTHER APPROVED METHOD SHALL BE PROVIDED BY CONTRACTOR AS NEEDED ON EXISTING WATER LINES AT THE PROPOSED RELOCATION TIE-IN POINTS.

7. THE LOCATION OF EXISTING UTILITIES SHOWN ON THE PLANS IS FOR THE USE OF THE CONTRACTOR IN PROVIDING PROTECTION FOR THE UTILITIES DURING CONSTRUCTION OPERATIONS. NCDOT AND UNION COUNTY DESIGN CONSULTANT WILL NOT BE HELD RESPONSIBLE FOR THE ACCURACY OF LOCATION, SIZE, DEPTH, OR COMPLETENESS OF THE INFORMATION. THE CONTRACTOR SHALL VERIFY LOCATION AND DEPTH OF ALL UNDERGROUND UTILITIES PRIOR TO CONSTRUCTION.

8. THE CONTRACTOR SHALL SUPPORT AND PROTECT ANY EXISTING UNDERGROUND UTILITIES ENCOUNTERED DURING TRENCH EXCAVATION AND/OR PIPE INSTALLATION.

9. MINIMUM PIPE SEPARATION: 10 FEET HORIZONTAL SEPARATION OR 18" VERTICAL SEPARATION SHALL BE MAINTAINED BETWEEN WATER MAINS OVER SEWER MAINS, WHEN WATER MAINS ARE BELOW SEWER MAINS OR THE ABOVE MINIMUM SEPARATIONS CANNOT BE MAINTAINED. DUCTILE IRON PIPE SHALL BE USED FOR BOTH MAINS TO 10 FEET ON EITHER SIDE OF THE CROSSINGS, AND ALL ALONG THE LENGTH OF MAINS WHERE MINIMUM SEPARATION CANNOT BE MAINTAINED.

10. PIPE THICKNESS FOR DUCTILE IRON PIPE 6 INCHES TO 12 INCHES IN DIAMETER TO BE PC 350. PIPE THICKNESS FOR DUCTILE IRON PIPE 16 INCHES AND LARGER MAY BE PC 250.

11. WELL IN ADVANCE OF BEGINNING UTILITY WORK, SOFT DIGS SHALL BE PERFORMED BY CONTRACTOR TO VERIFY ACTUAL WATER LINE DEPTH AND MATERIAL AT PROPOSED TIE-IN LOCATIONS.

12. LAY PIPE STRAIGHT IN ALIGNMENT AND GRADIENT OR FOLLOW TRUE CURVES AS NEARLY AS POSSIBLE. DO NOT DEFLECT ANY JOINT MORE THAN HALF THE MAXIMUM DEFLECTION RECOMMENDED BY THE MANUFACTURER.

13. CONTRACTOR SHALL ADHERE TO SECTION 15301 "ABANDON OR REMOVE UTILITIES" FOR ABANDONMENT OF EXISTING WATER LINES.

14. CONTRACTOR SHALL COORDINATE SHUTDOWNS OF WATER LINES FOR TIE-INS A MINIMUM OF 96 HOURS IN ADVANCE OF TIE-IN OPERATIONS. COORDINATE WITH UNION COUNTY FIELD REPRESENTATIVE.

15. ALL DUCTILE IRON WATER PIPE AND FITTINGS SHALL BE FURNISHED WITH CEMENT MORTAR LINING AND SEAL COATING IN ACCORDANCE WITH ANSI/AWWA A21.4/C104.

16. DUCTILE IRON SEWER PIPE AND FITTINGS SHALL BE FURNISHED WITH CERAMIC EPOXY LINING, TNEMEC 431 OR EQUAL, AND SEAL COATED IN ACCORDANCE WITH ANSI/AWWA A21.4/C104.

17. PRIOR TO THE START OF PROJECT CONTRACTOR MUST CONTACT THOMAS MANN, CIP PROGRAM MANAGER OF UNION COUNTY WATER. UNION COUNTY WATER MAY INSPECT THE WORK AT ANY TIME.

18. NO INTERRUPTION OF EXISTING WATER SERVICE SHALL BE MADE DURING CONSTRUCTION UNTIL AUTHORIZED BY UNION COUNTY WATER. UNION COUNTY WATER WILL BE COPIED ON BOTH THE WATER MAIN PRESSURE TEST REPORT AND THE WATER MAIN CHLORINATION TEST REPORT. UNION COUNTY COLLECTS SAMPLES FOR BACTERIOLOGICAL TESTING. SAMPLES WILL BE COLLECTED ONLY ON WEDNESDAY MORNINGS, USUALLY BEFORE 9:00 AM. SCHEDULE WATER INSTALLATIONS AND PRESSURE TESTING ACCORDINGLY. THERE WILL BE NO COST TO THE CONTRACTOR FOR BACTERIOLOGICAL TESTING FOR THE FIRST SAMPLES COLLECTED FOR EACH SEGMENT. RE-TESTING FOR FAILING BACTERIOLOGICAL TESTS WILL BE $50.00 PER SAMPLE, PAYABLE TO K&W LABORATORIES, TO BE PAID BY CONTRACTOR. PRICE IS SUBJECT TO CHANGE. UNION COUNTY WILL NOT ACCEPT TEST RESULTS FROM OUTSIDE TESTING LABS.

19. EXISTING WATER VALVES ARE TO BE OPERATED BY UNION COUNTY OPERATIONS STAFF.

20. WHEN ABANDONING VALVES, CLOSE VALVE BEFORE REMOVING VALVE BOX.

210. INSTALLATION OF PIPE MAY REQUIRE EXCAVATING AROUND AND BENEATH RELOCATED TELECOMMUNICATION AND OTHER UTILITY LINES FOR WATER RELOCATION.

22. PROPOSED WATER SERVICE LINE SHALL BE TYP "K" COPPER TUBING. SPLICING OF COPPER SERVICE LINE BETWEEN THE WATER METER AND EXISTING OR NEW WATER LINES WILL NOT BE ALLOWED FOR ANY CASE. PROVIDE AND INSTALL A CONTINUOUS SEGMENT OF COPPER WATER SERVICE LINE BETWEEN THE CORPORATION STOP AND WATER METER. IN THE EVENT A WATER SERVICE PIPE IS DAMAGED DURING THE COURSE OF CONSTRUCTION, A NEW REPLACEMENT COPPER SERVICE LINE IS TO BE INSTALLED BETWEEN THE WATER LINE AND WATER METER AT NO COST TO UNION COUNTY OR NCDOT.

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3
DESIGNED BY: CS	
DRAWN BY: CS	
CHECKED BY: MM	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCUS R. MENENDEZ

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UTILITY CONSTRUCTION

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$$$$$$$DGN$$$$$$$$$$$$$$$$$$$$
$$$$$$$USERNAME$$$$

8/17/99

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3B
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	

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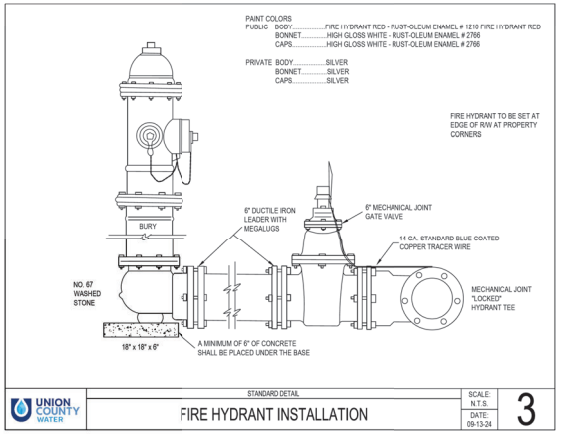
NORTH CAROLINA PROFESSIONAL ENGINEER SEAL 032322 REGISTERED

UTILITY CONSTRUCTION PLANS ONLY

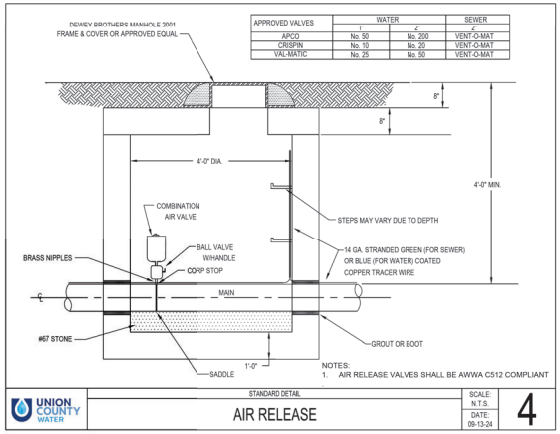
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UTILITY CONSTRUCTION

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STANDARD DETAIL — FIRE HYDRANT INSTALLATION — SCALE: N.T.S. — DATE: 09-13-24 — 3



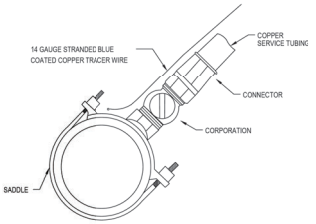
APPROVED VALVES	WATER 1"	WATER 2"	SEWER 4"
APCO	No. 50	No. 200	VENT-O-MAT
CRISPIN	No. 10	No. 20	VENT-O-MAT
VAL-MATIC	No. 25	No. 50	VENT-O-MAT

NOTES:
1. AIR RELEASE VALVES SHALL BE AWWA C512 COMPLIANT

STANDARD DETAIL — AIR RELEASE — SCALE: N.T.S. — DATE: 09-13-24 — 4

NOTE:
1. ROMAC 101N SHALL REPLACE MUELLER FOR PIPE DIAMETER UP TO 8"
2. SMITH BLAIR 317, FORD FC 202 OR ROMAC 202N SHALL REPLACE MUELLER FOR PIPE DIA. 12" AND UP
3. SERVICE SADDLES SHALL HAVE TWO FLAT STRAPS (PER UCW SPECIFICATION SECTION 5, 5.01, B)
4. EXISTING SERVICES BEING CONNECTED TO NEW LINES SHALL BE ONE CONTINUOUS ROLL OF COPPER
5. MINIMUM 18-INCH SEPARATION BETWEEN SERVICE CONNECTION AND MECHANICAL JOINT FITTINGS

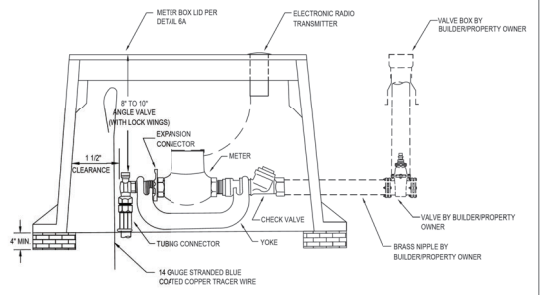
APPROVED SERVICE HARDWARE		MUELLER	FORD
	2" PVC	H-13420	S70
SADDLE	UP TO 8"	SEE NOTE	FC 101
BALL CORPORATION		B-25008	FB10000
YOKE		H-5020	Y 502
ANGLE BALL VALVE		B-24273	BA84-323WG
CHECK VALVE		H-14247-A	HH591-323
CONNECTORS	COPPER	STYLE 110	GRIP JOINT
EXPANSION CONNECTION			EC 23



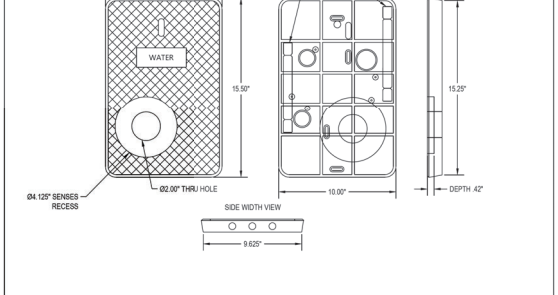
STANDARD DETAIL — SERVICE CONNECTION — SCALE: N.T.S. — DATE: 09-13-24 — 5

GENERAL NOTES

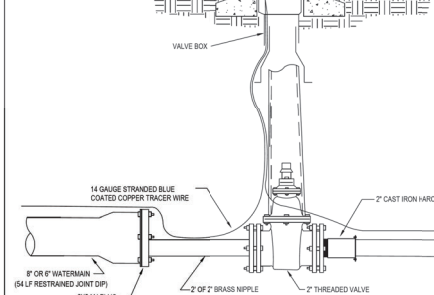
1. BUILDER/PROPERTY OWNER TO INSTALL NIPPLE, VALVE AND VALVE BOX BEFORE METER WILL BE SET.
2. FOR SUBDIVISION WITH SIDEWALKS EXTEND COPPER TUBING AFTER THE METER BOX 2 FT BEYOND PROPOSED SIDEWALK
3. CONTRACTOR SHALL USE ONE CONTINUOUS ROLL OF COPPER FROM TAP TCMETER. NO SPLICING IS PERMITTED
4. METERAND ERT BY UNION COUNTY AT PREVAILING RATE



STANDARD DETAIL — METER INSTALLATION FOR ¾" AND 1" METERS — SCALE: N.T.S. — DATE: 09-13-24 — 6



STANDARD DETAIL — METER BOX LID FOR ¾" AND 1" METERS — SCALE: N.T.S. — DATE: 02/06/20 — 6A



STANDARD DETAIL — 8" OR 6" x 2" REDUCER — SCALE: N.T.S. — DATE: 10-04-11 — 7

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8/17/99

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3C
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
UTILITIES ENGINEERING SEC. PHONE:(919)707-6690 FAX:(919)250-4151	UTILITY CONSTRUCTION PLANS ONLY

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER

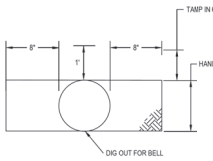
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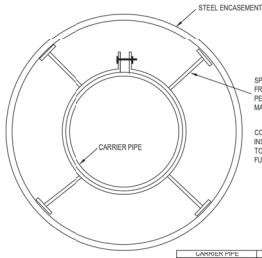
NOTES

1. 2" PVC SDR 21
2. 6"-8" PVC SDR 18
3. 12" OR LARGER DIP
4. CAREFULLY COMACTED BACK FILL 1 FT ABOVE PIPE
5. NO STONES LARGER THAN # 67 SONE SHALL BE USED IN SELECT BACKFILL
6. 14 GA. STANDARD BLUE COATED COPPER TRACER WIRE STALL BE INSTALLED VALVE TO VALVE
7. PIPE 8-IN AND LESSER MINIMUM RESTRAINED JOINT DIP LENGTH 54 LF.
8. PIPE 12-IN AND LARGER MINIMUM LENGTH OF RESTRAINT JOINT DIP 54 LF FINAL LENGTH TO BE DETERMINED BY ENGINEER.



WATER MAIN MINIMUM COVER IS 3.0' AND MAXIMUM COVER IS 6.0' UNLESS PRIOR APPROVAL IS GRANTED BY UCW

UNION COUNTY WATER | STANDARD DETAIL | WATER TRENCH | SCALE: N.T.S. | DATE: 09-13-24 | 8B

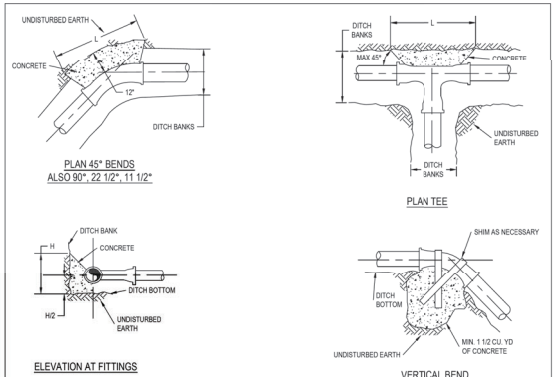


CARRIER PIPE	CASING PIPE I.D.	WALL THICKNESS
4"	8"	0.188"
6"	12"	0.188"
8"	16"	0.250"
10"	16"	0.250"
12"	20"	0.281"
16"	24"	0.344"
24"	30"	0.406"
30"	42"	0.500"
36"	48"	0.500"

NOTES:

1. NO PIPE SHALL BE SUPPORTED BY BELL.
2. END SECTIONS LESS THAN 4' MAY BE UNSUPPORTED.
3. WALL THICKNESS AS PER TABLE UNLESS OTHERWISE SHOWN ON PLAN.
4. MASONRY SEAL AT ENDS – 2" x 4" WEEP HOLE AT LOW END
5. ALL PRESSURE PIPES TO HAVE TRACING WIRE IN ALL CASING BORES.

UNION COUNTY WATER | STANDARD DETAIL | PIPE ENCASEMENT | SCALE: N.T.S. | DATE: 11-17-06 | 14



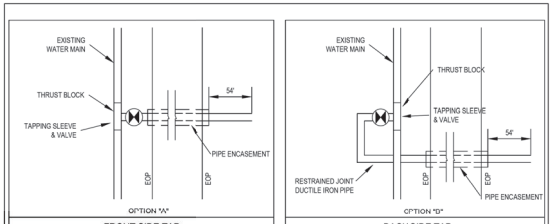
UNION COUNTY WATER | STANDARD DETAIL | THRUST BLOCK | SCALE: N.T.S. | DATE: 11-17-06 | 16

ANCHORAGE SCHEDULE											
PIPE SIZE	11 1/4° BEND		2 1/2° BEND		45° BEND		90° BEND		TEE		TEST PRESSURE (P.S.I.)
	L	H	L	H	L	H	L	H	L	H	
6"	1'3"	1'0"	2'3"	1'0"	2'6"	1'6"	2'9"	1'6"	2'0"	1'6"	200
	1'6"	1'3"	2'3"	1'6"	3'0"	1'6"	4'0"	1'6"	3'0"	1'6"	300
8"	1'6"	1'6"	2'6"	1'9"	3'0"	2'0"	3'9"	2'0"	2'6"	2'0"	200
	2'0"	1'6"	3'0"	2'0"	3'9"	2'3"	4'6"	2'6"	3'6"	2'3"	300
12"	2'6"	1'9"	4'0"	2'3"	4'3"	3'0"	5'0"	3'3"	4'0"	3'0"	200
	3'6"	2'0"	5'3"	2'6"	6'0"	3'3"	7'0"	3'6"	5'0"	3'6"	300
14"	3'0"	1'0"	4'0"	3'0"	4'6"	3'9"	6'0"	3'9"	4'6"	3'6"	200
	4'0"	2'6"	5'3"	3'6"	6'0"	4'3"	8'6"	5'0"	5'0"	5'0"	300
16"	3'0"	2'9"	4'6"	3'6"	5'0"	4'6"	7'0"	4'3"	5'0"	4'0"	200
	4'0"	3'0"	6'3"	3'9"	6'5"	5'3"	8'0"	5'3"	7'6"	4'0"	300

NOTE:

1. THRUST BLOCK DIMENSIONS BASED ON SOIL BEARING CAPACITY OF 2000 P.S.F. AND A WATER TEST PRESSURE OF 150 P.S.I. SIZES OF THRUST BLOCKS MAY BE REVISED BY THE ENGINEER WHERE BEARING CAPACITY OF SOIL VARIES.
2. PROVIDE TAR PAPER JOINT BETWEEN CONCRETE THRUST BLOCK AND PORTION OF PIPE BEING ANCHORED.
3. ALL CONCRETE THRUST BLOCKS SHALL BE 2500 P.S.I. CONCRETE.
4. MAXIMUM VERTICAL DEFLECTION SHALL BE 22 1/2°.
5. JOINTS SHALL REMAIN FREE OF CONCRETE FOR INSPECTION, REPAIR OR REPLACEMENT OF JOINTS.

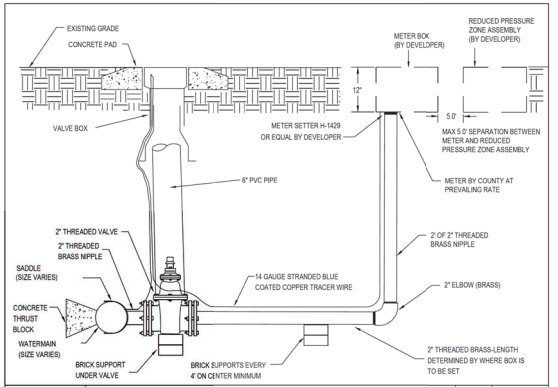
UNION COUNTY WATER | STANDARD DETAIL | THRUST BLOCK SPECIFICATION | SCALE: N.T.S. | DATE: 02-19-14 | 17



NOTES:

1. OPTION "A" OR "B" WILL BE REQUIRED, DEPENDING ON THE AMOUNT OF SPACE AVAILABLE, TO BE FIELD VERIFIED.
2. RESTRAINED JOINT DUCTILE IRON PIPE REQUIRED FROM VALVE TO 54 LF BEYOND CASING.

UNION COUNTY WATER | STANDARD DETAIL | TAPPING SLEEVE | SCALE: N.T.S. | DATE: 09-13-24 | 18



UNION COUNTY WATER | STANDARD DETAIL | 2" SHORT SIDE SERVICE FOR 1 ½ OR 2" METERS | SCALE: N.T.S. | DATE: 09-13-24 | 19

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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3D
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
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NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

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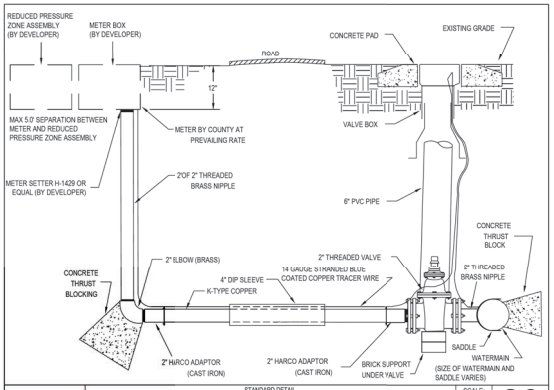
NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER DAVID R. MENEFEE

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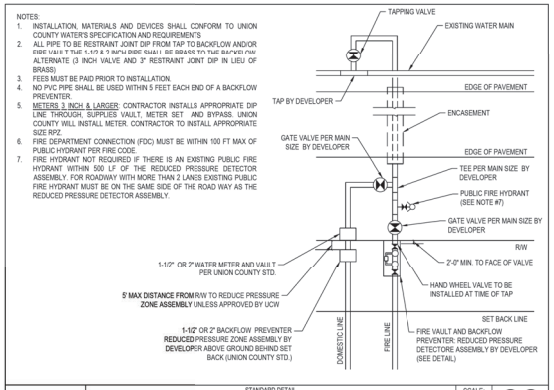
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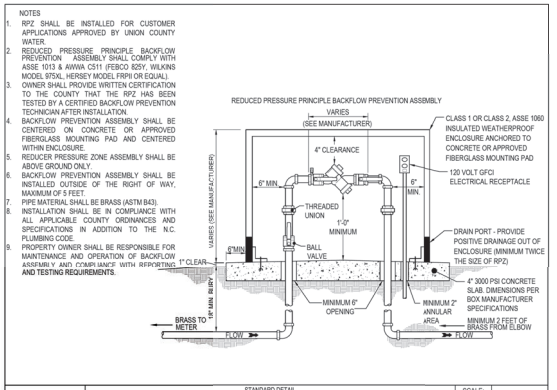
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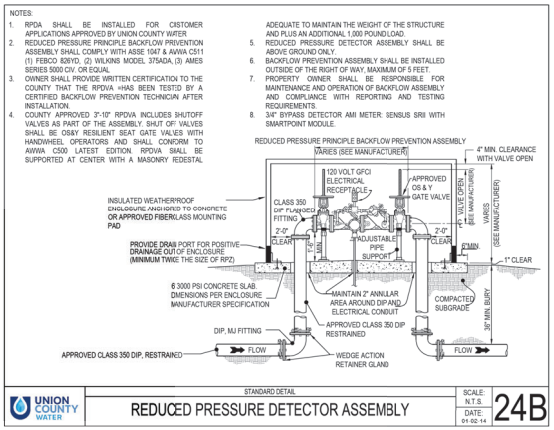
STANDARD DETAIL — 2" LONG SIDE SERVICE FOR 1 ½ OR 2" METERS — SCALE: N.T.S. — DATE: 09-13-24 — 20



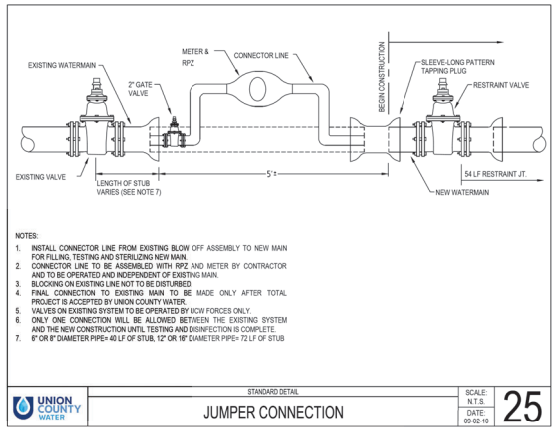
STANDARD DETAIL — WATER CONNECTION — SCALE: N.T.S. — DATE: 02-19-14 — 22



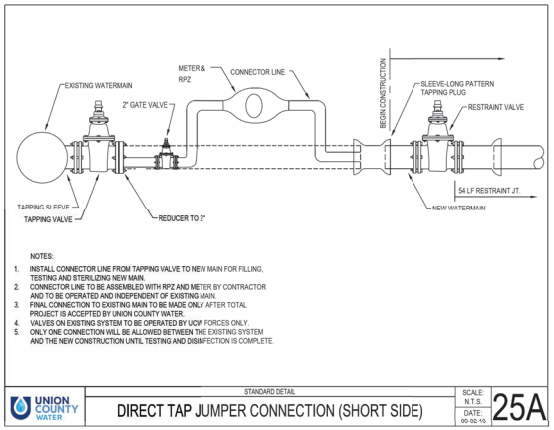
STANDARD DETAIL — REDUCED PRESSURE ZONE ASSEMBLY (¾" - 2") — SCALE: N.T.S. — DATE: 02-19-14 — 24A



STANDARD DETAIL — REDUCED PRESSURE DETECTOR ASSEMBLY — SCALE: N.T.S. — DATE: 01-02-14 — 24B



STANDARD DETAIL — JUMPER CONNECTION — SCALE: N.T.S. — DATE: 00-02-10 — 25



STANDARD DETAIL — DIRECT TAP JUMPER CONNECTION (SHORT SIDE) — SCALE: N.T.S. — DATE: 00-02-10 — 25A

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3E
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

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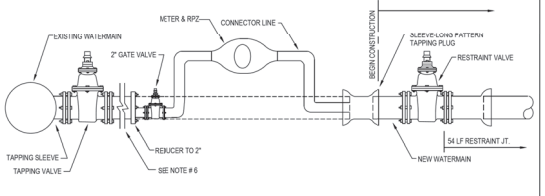
NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO P. MENENDEZ

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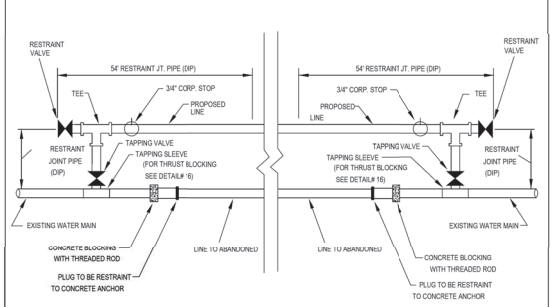
UTILITY CONSTRUCTION

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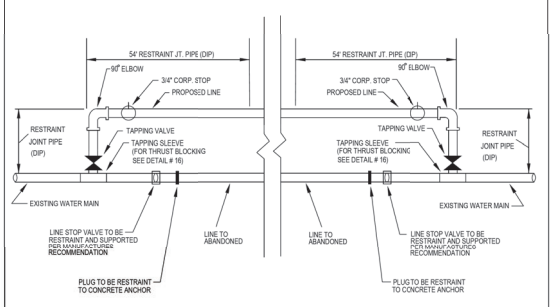
NOTES:
1. INSTALL CONNECTOR LINE FROM TAPPING VALVE TO NEW MAIN FOR FLUSHING, TESTING AND STERILIZING NEW MAIN.
2. CONNECTOR LINE TO BE ASSEMBLED WITH RPZ AND METER BY CONTRACTOR AND TO BE OPERATED AND INDEPENDENT OF EXISTING MAIN.
3. FINAL CONNECTION TO EXISTING MAIN TO BE MADE ONLY AFTER TOTAL PROJECT IS ACCEPTED BY UNION COUNTY PUBLIC WORKS.
4. VALVES ON EXISTING SYSTEM TO BE OPERATED BY UCW FORCES ONLY.
5. ONLY ONE CONNECTION WILL BE ALLOWED BETWEEN THE EXISTING SYSTEM AND THE NEW CONSTRUCTION UNTIL TESTING AND DISINFECTION IS COMPLETE.
6. MAXIMUM LENGTH OF PIPE NOT TO EXCEED 100'

STANDARD DETAIL — DIRECT TAP JUMPER CONNECTION (LONG SIDE) — SCALE: N.T.S. — DATE: 09-02-10 — 25B



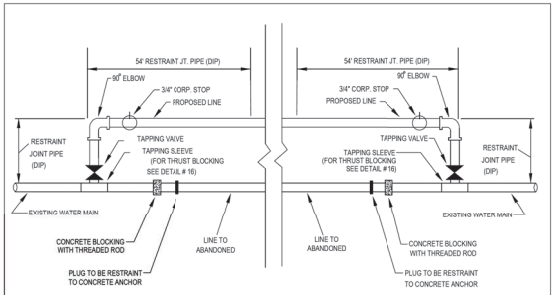
NOTE:
1. ALL WATERMAINS ALONG EXISTING DOT ROADS MUST BE A MINIMUM DISTANCE OF A 1'+ 1/1 RATIO OFF EDGE OF PAVEMENT OR BACK OF CURB.

STANDARD DETAIL — WATERMAIN RELOCATION DETAIL — SCALE: N.T.S. — DATE: 04-03-06 — 27



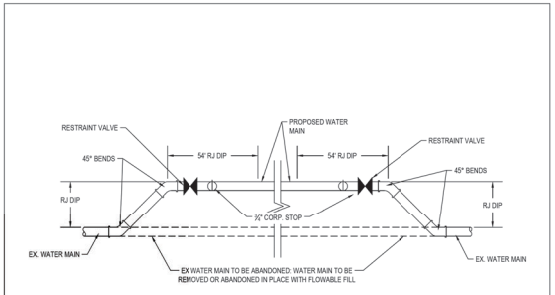
NOTE:
1. ALL WATERMAINS ALONG EXISTING DOT ROADS MUST BE A MINIMUM DISTANCE OF A 1'+ 1/1 RATIO OFF EDGE OF PAVEMENT OR BACK OF CURB.

STANDARD DETAIL — LARGE WATERMAIN RELOCATION DETAIL — SCALE: N.T.S. — DATE: 03-08-11 — 27A



NOTE:
1. ALL WATERMAINS ALONG EXISTING DOT ROADS MUST BE A MINIMUM DISTANCE OF A 1'+ 1/1 RATIO OFF EDGE OF PAVEMENT OR BACK OF CURB.

STANDARD DETAIL — SMALL WATERMAIN RELOCATION DETAIL — SCALE: N.T.S. — DATE: 03-08-11 — 27B



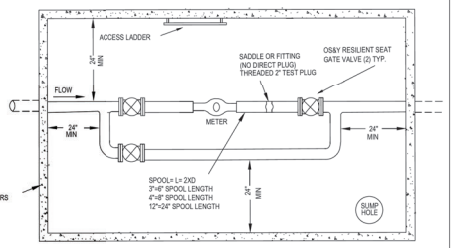
NOTE:
1. ALL WATERMAINS ALONG EXISTING DOT ROADS MUST BE A MINIMUM DISTANCE OF A 1'+ 1/1 RATIO OFF EDGE OF PAVEMENT OR BACK OF CURB.
2. CONNECTION MUST BE MADE AT FACTORY ENDS IF EXISTING WATER MAIN IS ASBESTOS CONCRETE

STANDARD DETAIL — LARGE WATER RELOCATION DETAIL — SCALE: N.T.S. — DATE: 09-13-24 — 27C

NOTES:
1. PIPING AND FITTINGS SHALL BE DUCTILE IRON (AWWA C151) CLASS 350 AND SHALL BE RESTRAINED JOINT OR FLANGED AS INDICATED ON THE DETAIL. RESTRAINED JOINTS SHALL BE MEGA-LUG RESTRAINED OR AN APPROVED EQUAL.
2. ALL VAULTS SHALL BE 3600 PSI CONCRETE AND CAPABLE OF WITHSTANDING 150 PSF LOADING IN NON TRAFFIC AREAS.
3. ACCESS HATCHES SHALL BE ALUMINUM 150 PSF WITH LOCKABLE COVER DEVICE. MANUFACTURER SHALL BE BILCO, HALIDAY OR APPROVED EQUAL.
4. INSTALL VAULT AT EDGE OF RIGHT OF WAY. DO NOT PLACE IN PAVEMENT.
5. PIPING TO BE A MINIMUM OF 18" OFF OF FLOOR.
6. DEVELOPER MUST CONTACT UCW CUSTOMER SERVICE TO PAY METER COST & INSTALLATION FEES AND SCHEDULE THE WATER METER INSTALLATION
7. BYPASS PIPE EQUAL TO METER SIZE

METER DIMENSIONS

Model	Octave			
NOMINAL SIZE	3"	4"	6"	8"
L- LENGTH	12"	14"	18"	20"
B- WIDTH	7 1/2"	9"	11"	13 1/2"
H- HEIGHT	8 1/2"	9 7/8"	10 7/8"	12 7/8"



STANDARD DETAIL — METER AND VAULT - 3" OR LARGER — SCALE: N.T.S. — DATE: 10-22-14 — 28

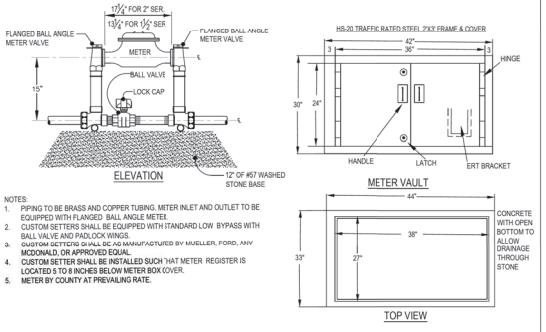
PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3F
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
UTILITIES ENGINEERING SEC. PHONE:(919)707-6690 FAX:(919)250-4151	UTILITY CONSTRUCTION PLANS ONLY

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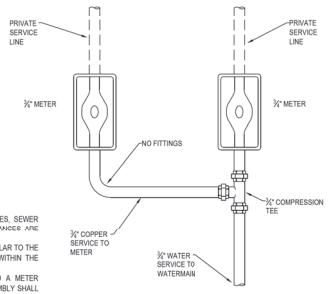
UTILITY CONSTRUCTION

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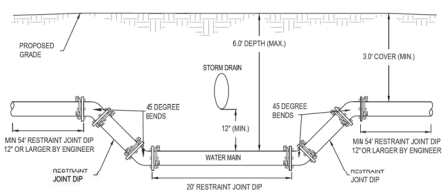
NOTES:
1. PIPING TO BE BRASS AND COPPER TUBING. METER INLET AND OUTLET TO BE EQUIPPED WITH FLANGED BALL ANGLE METER
2. CUSTOM SETTERS SHALL BE EQUIPPED WITH STANDARD LOW BYPASS WITH BALL VALVE AND PADLOCK WINGS.
3. CUSTOM SETTERS SHALL BE AS MANUFACTURED BY MUELLER, FORD, ANY MCDONALD, OR APPROVED EQUAL.
4. CUSTOM SETTER SHALL BE INSTALLED SUCH THAT METER REGISTER IS LOCATED 5 TO 8 INCHES BELOW METER BOX COVER.
5. METER BY COUNTY AT PREVAILING RATE.

STANDARD DETAIL — STANDARD 1.5" AND 2" METER INSTALLATION & VAULT — SCALE: N.T.S. — DATE: 06-13-14 — 29



NOTES:
1. METERS WILL NOT BE SET IF WATER METER BOXES, SEWER CLEAN OUTS, VALVE BOXES OR THEIR APPURTENANCES ARE DAMAGED OR IMPROPERLY POSITIONED.
2. WATER METERS ARE TO BE INSTALLED PERPENDICULAR TO THE ROAD AND WITHIN THE ROAD RIGHT-OF-WAY OR WITHIN THE LIMITS OF A PROPOSED UTILITY EASEMENT.
3. IF THE IRRIGATION LINE IS TO BE UTILIZED AND A METER SET,THE APPROPRIATE REDUCED PRESSURE ASSEMBLY SHALL BE INSTALLED BY THE CONTRACTOR PER UCPW DETAIL 24A.
4. THE PLUMBER/BUILDER IS RESPONSIBLE FOR LABELING IRRIGATION AND DOMESTIC METERS AT TIME OF THEIR CONNECTION

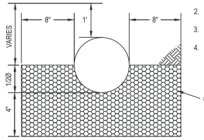
STANDARD DETAIL — IRRIGATION AND DUAL METER TAP — SCALE: N.T.S. — DATE: 12-10-19 — 30



STANDARD DETAIL — WATERMAIN UNDER STORM DRAIN CROSSING — SCALE: N.T.S. — DATE: 09-13-24 — 31

NOTES
1. CAREFULLY COMACTED BACK FILL 1 FT ABOVE PIPE
2. NO STONES LARGER THAN # 67 SONE SHALL BE USED IN SELECT BACKFILL
3. 14 GA. STANDARD BLUE COATED COPPER TRACER WIRE STALL BE INSTALLED MANHOLE TO MANHOLE
4. MINIMUM PIPE SLOPE IS 0.50%

GRAVITY SEWER - BEDDING DETAIL

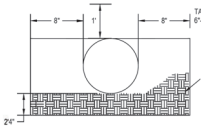


CLASS C

REQUIRED MATERIAL FOR DEPTH OF BURY:
1. COVER GREATER LESS THAN 3.0 FT OR GREATER THAN 18.0 FT USE DUCTILE IRON PIPE
2. COVER GREATER THAN 3.0 FT BUT LESS THAN 10.0 FT USE SDR-35
3. COVER GREATER THAN 10.0 FT BUT LESS THAN 18.0 FT USE SDR-26
4. SDR-35 AND SDR-26 REQUIRED CELL CLASS 12454

GRAVITY SEWER MINIMUM COVER IS 3.0' AND MAXIMUM COVER IS 14.0' UNLESS PRIOR APPROVAL IS GRANTED BY UCW

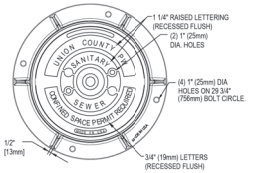
NOTES
1. CAREFULLY COMACTED BACK FILL 1 FT ABOVE PIPE
2. 14 GA. STANDARD BLUE COATED COPPER TRACER WIRE STALL BE INSTALLED VALVE BOX TO VALVE BOX
4. PIPE 8-IN AND LESSER MINIMUM RESTRAINED JOINT DIP LENGTH 54 LF.
5. PIPE 12-IN AND LARGER LENGTH TO BE DETERMINED BY ENGINEER. MINIMUM LENGTH OF RESTRAINT JOINT DIP 54 LF FINAL



FORCE MAIN

FORCE MAIN MINIMUM COVER IS 3.0' AND MAXIMUM COVER IS 5.0' UNLESS PRIOR APPROVAL IS GRANTED BY UCW

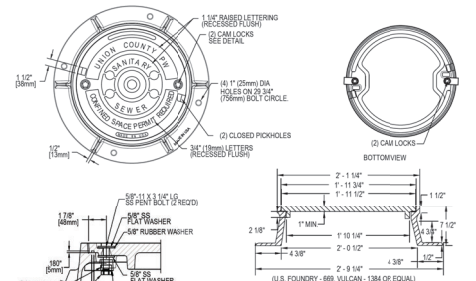
STANDARD DETAIL — SEWER BEDDING — SCALE: N.T.S. — DATE: 06-13-24 — 8A



(U.S. FOUNDRY - 669, VULCAN - 1384 OR EQUAL)

NOTES:
1. ALL CASTINGS TO BE FREE FROM SAND HOLES. NO PLUGGING ALLOWED.
2. MACHINE ALL CONTACT SURFACES BETWEEN RING AND COVER.
3. PROVIDE TWO VENT HOLES IN COVER, 1" DIA. TAPERED TO 1-1/8" ON REVERSE SIDE.
4. MINIMUM WEIGHTS: COVER - 120 LBS. RING - 190 LBS.
5. ALL MANHOLE RINGS OUT OF ROAD RIGHT OF WAY SHALL BE BOLTED INTO MANHOLE WITH 5/8" DIAMETER KWIK BOLT STUD ANCHOR SYSTEM. HILTI BRAND OR APPROVED EQUAL.

STANDARD DETAIL — RING AND COVER — SCALE: N.T.S. — DATE: 09-09-11 — 9



(U.S. FOUNDRY - 669, VULCAN - 1384 OR EQUAL)

NOTES:
1. ALL CASTINGS TO BE FREE FROM SAND HOLES. NO PLUGGING ALLOWED.
2. MACHINE ALL CONTACT SURFACES BETWEEN RING AND COVER.
3. PROVIDE 2 CLOSED PICKHOLES
4. MINIMUM WEIGHTS: COVER - 95 LBS. RING - 190 LBS.
5. ALL MANHOLE RINGS OUT OF ROAD RIGHT OF WAY SHALL BE BOLTED INTO MANHOLE WITH 5/8" DIAMETER KWIK BOLT STUD ANCHOR SYSTEM. HILTI BRAND OR APPROVED EQUAL.

STANDARD DETAIL — RING AND COVER FOR SEALED MANHOLES — SCALE: N.T.S. — DATE: 09-09-11 — 9A

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3G

DESIGNED BY: AP
DRAWN BY: AP
CHECKED BY: TB
APPROVED BY:
REVISED:

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
UTILITIES ENGINEERING SEC.
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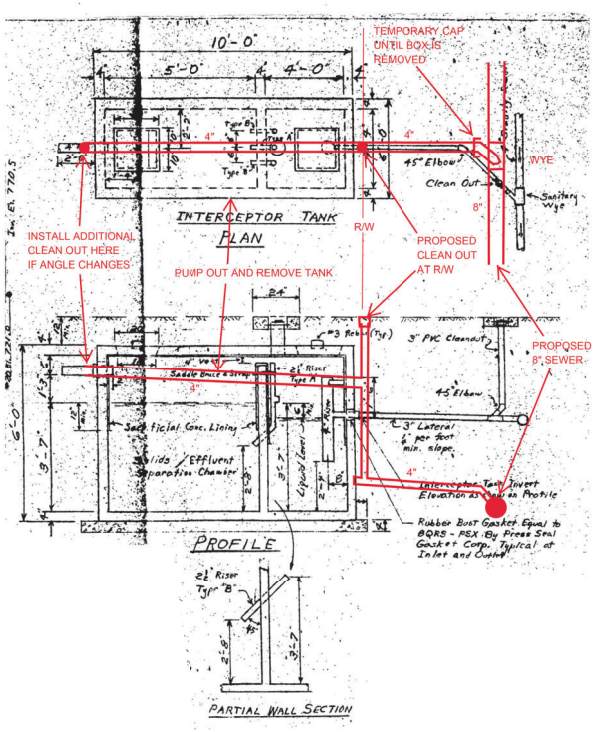
NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARVIN R. MEMMINGER

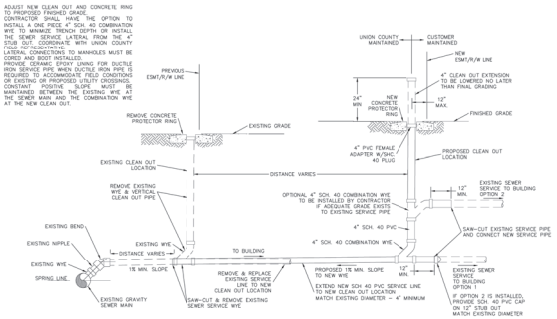
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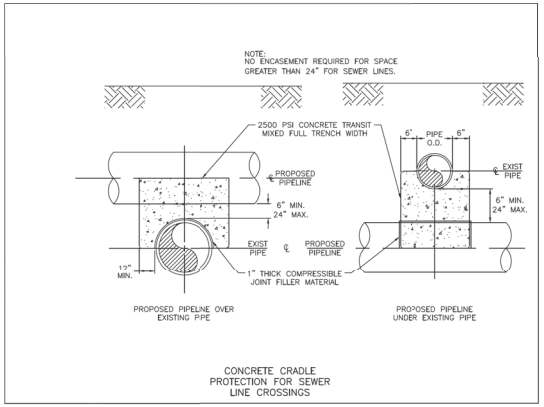
UTILITY CONSTRUCTION

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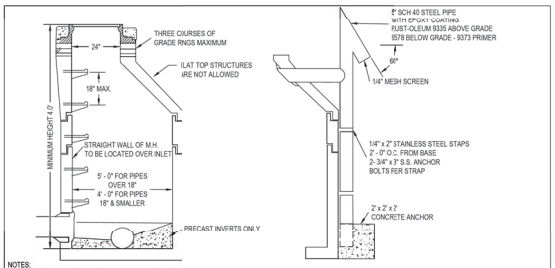




RELOCATION OF EXISTING SANITARY SEWER CLEAN OUT

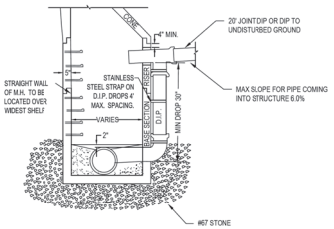


CONCRETE CRADLE PROTECTION FOR SEWER LINE CROSSINGS



NOTES:
1. 1 ROLL OF MASTIC AND A 6" EXTERNAL JOINT SEAL WRAP INSTALLED ON EACH MANHOLE SECTION
2. MANHOLE VACUUM TESTING - AFTER EACH MANHOLE IS INSTALLED AND ALL PIPES ARE CONNECTED, BUT BEFORE BACKFILLING, THE MANHOLE SHALL BE VACUUM TESTED. ALL PIPES ENTERING THE MANHOLE SHALL BE PLUGGED AND BRACED. THE CONTRACTOR SHALL FURNISH ALL MATERIALS, LABOR AND EQUIPMENT NECESSARY TO PERFORM THE TESTING. A VACUUM OF 10 INCHES OF MERCURY SHALL BE CREATED ON THE INSIDE OF THE MANHOLE. AT THE VACUUM OF 10 INCHES OF MERCURY, THE PUMP SHALL BE STOPPED AND THE TIME SHALL BE MEASURED FOR THE VACUUM TO DROP TO 9 INCHES. FAILURE OF THE TEST SHALL BE ANY AMOUNT OF TIME LESS THAN THE FOLLOWING.
   4 FT. DIAMETER MANHOLE = 60 SECONDS
   5 FT. DIAMETER MANHOLE = 75 SECONDS
   6 FT. DIAMETER MANHOLE = 90 SECONDS
   7 FT. DIAMETER MANHOLE = 105 SECONDS
   8 FT. DIAMETER MANHOLE = 120 SECONDS
   10 F. DIAMETER MANHOLE = 150 SECONDS
   UPON TEST FAILURE, THE CONTRACTOR SHALL REPAIR ALL LEAKS AND RETEST THE MANHOLE UNTIL THE TEST HAS PASSED.
3. 0.20' INSIDE DROP REQUIRED
4. INSTALL MANHOLE RIM AT 0.10' ABOVE GRADE IN LANDSCAPED AREAS AND WHILE ADJACENT TO RIGHTS-OF-WAY
5. INSTALL MANHOLE RIM AT 2.0' ABOVE GRADE IN SEWER EASEMENTS THAT ARE NOT LANDSCAPED.

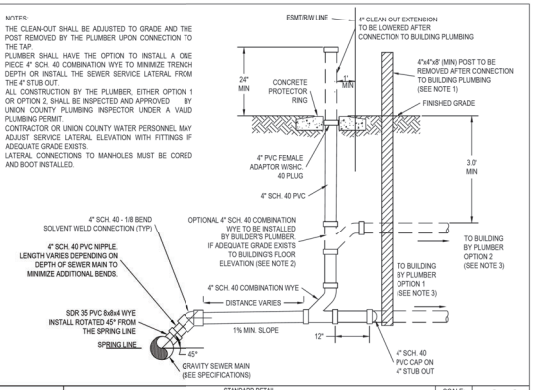
UNION COUNTY WATER | STANDARD DETAIL | MANHOLE | SCALE: N.T.S. | DATE: 09-13-24 | 10



GENERAL NOTES
1. CARE MUST BE TAKEN TO FORM A SMOOTH FINISHED TROUGH FROM ENTRANCE PIPES TO EXIT PIPE, AND IN CURVED MANHOLES THE TROUGH MUST BE A SMOOTH CIRCULAR ARC TANGENT TO THE INSIDE WALLS OF THE PIPES AT THEIR ENDS.
2. THE SLOPE OF THE OUTSIDE DROP TROUGH SHALL BE 1/4" PER FOOT.
3. ALL PIPE OPENINGS TO BE NO GREATER THAN 3" LARGER THAN O.D. OF PIPE AND ADDITIONALLY REINFORCED WITH A MINIMUM OF 0.20 SQ. IN. OF STEEL AT 90 DEGREES. PIPE TO BE CENTERED IN OPENINGS. ADDITIONAL REINFORCING NOT REQUIRED FOR CORED OPENINGS.
4. OUTSIDE DROP SHALL NOT ENTER MANHOLE IN CONE SECTION.
5. MATCH DROP INFLUENT CROWN TO CROWN WITH EFFLUENT PIPE.
6. 0.20' INSIDE DROP REQUIRED
7. INSTALL MANHOLE RIM AT 0.10' ABOVE GRADE IN LANDSCAPED AREAS AND WHILE ADJACENT TO RIGHTS-OF-WAY
8. INSTALL MANHOLE RIM AT 2.0' ABOVE GRADE IN SEWER EASEMENTS THAT ARE NOT LANDSCAPED.

UNION COUNTY WATER | STANDARD DETAIL | OUTSIDE DROP MANHOLE | SCALE: N.T.S. | DATE: 09-13-24 | 10B

NOTES:
1. THE CLEAN-OUT SHALL BE ADJUSTED TO GRADE AND THE POST REMOVED BY THE PLUMBER UPON CONNECTION TO THE TAP.
2. PLUMBER SHALL HAVE THE OPTION TO INSTALL A ONE PIECE 4" SCH. 40 COMBINATION WYE TO MINIMIZE TRENCH DEPTH OR INSTALL THE SEWER SERVICE LATERAL FROM THE 4" STUB OUT.
3. ALL CONSTRUCTION BY THE PLUMBER, EITHER OPTION 1 OR OPTION 2, SHALL BE INSPECTED AND APPROVED BY UNION COUNTY PLUMBING INSPECTOR UNDER A VAUD PLUMBING PERMIT.
4. CONTRACTOR OR UNION COUNTY WATER PERSONNEL MAY ADJUST SERVICE LATERAL ELEVATION WITH FITTINGS IF ADEQUATE GRADE EXISTS.
5. LATERAL CONNECTIONS TO MANHOLES MUST BE CORED AND BOOT INSTALLED.



UNION COUNTY WATER | STANDARD DETAIL | SEWER LATERAL | SCALE: N.T.S. | DATE: 02-19-14 | 11

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3H
DESIGNED BY: TW	
DRAWN BY: TW	
CHECKED BY: MM	
APPROVED BY:	
REVISED:	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
UTILITIES ENGINEERING SEC. PHONE: (919)707-6690 FAX: (919)250-4151	UTILITY CONSTRUCTION PLANS ONLY

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO R. MENENDEZ

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UTILITY CONSTRUCTION

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SANITARY SEWER MANHOLE SCHEDULES

-SS-1-

MANHOLE SCHEDULE

MANHOLE LOCATION						OUTFLOW PIPE (DIAMETER AND DEPTH)				INFLOW PIPES (DIAMETER , DEPTH, ANGLE FROM OUTFLOW PIPE)							
										PIPE 1				PIPE 2			
MH ID	STATION	MANHOLE TYPE	NORTHING	EASTING	RIM ELEV. FT	DIA. IN.	Invert Elev. FT.	DEPTH TO INV. FT	GREATER THAN 6	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE
101	0+00	4' STANDARD	491899.835	1491807.023	771.1	8	TBD	-	2.9	8	762.27	8.83	-				
102	1+48.84	4' STANDARD	491972.846	1491936.720	776.2	8	768.80	7.40	1.4	8	769.00	7.20	92°42'41"				
103	2+42.08	4' STANDARD	491893.841	1491986.241	779.0	8	771.00	8.00	2.0	8	TBD	-	-				

-SS-2-

MANHOLE SCHEDULE

MANHOLE LOCATION						OUTFLOW PIPE (DIAMETER AND DEPTH)				INFLOW PIPES (DIAMETER , DEPTH, ANGLE FROM OUTFLOW PIPE)							
										PIPE 1				PIPE 2			
MH ID	STATION	MANHOLE TYPE	NORTHING	EASTING	RIM ELEV. FT	DIA. IN.	Invert Elev. FT.	DEPTH TO INV. FT	GREATER THAN 6	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE
201	2+19.26	4' STANDARD	491002.663	1493276.630	764.8	8	755.30	9.52	3.5	8	755.50	9.32	106°33'59"				
202	2+62.47	4' STANDARD	490959.780	1493280.969	765.4	8	755.66	9.75	3.8	8	755.86	9.55	107°40'04"				
203	3+57.65	4' STANDARD	490921.686	1493193.704	767.1	8	756.22	10.86	4.9	8	756.42	10.66	00°00'00"				
204	6+28.33	4' STANDARD	490813.718	1492945.455	771.7	8	762.36	9.37	3.4	8	762.56	9.17	88°44'52"				

-SS-3-

MANHOLE SCHEDULE

MANHOLE LOCATION						OUTFLOW PIPE (DIAMETER AND DEPTH)				INFLOW PIPES (DIAMETER , DEPTH, ANGLE FROM OUTFLOW PIPE)							
										PIPE 1				PIPE 2			
MH ID	STATION	MANHOLE TYPE	NORTHING	EASTING	RIM ELEV. FT	DIA. IN.	Invert Elev. FT.	DEPTH TO INV. FT	GREATER THAN 6	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE
301	0+52.59	4' STANDARD	490291.637	1492525.917	780.7	8	777.4	3.25	-	8	777.5	3.15	-				

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-3 I
DESIGNED BY: TW	
DRAWN BY: TW	
CHECKED BY: MM	
APPROVED BY:	
REVISED:	

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UTILITIES ENGINEERING SEC.
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SANITARY SEWER MANHOLE SCHEDULES

-SS-4-

MANHOLE SCHEDULE

MANHOLE LOCATION						OUTFLOW PIPE (DIAMETER AND DEPTH)				INFLOW PIPES (DIAMETER , DEPTH, ANGLE FROM OUTFLOW PIPE)							
										PIPE 1				PIPE 2			
MH ID	STATION	MANHOLE TYPE	NORTHING	EASTING	RIM ELEV. FT	DIA. IN.	Invert Elev. FT.	DEPTH TO INV. FT	GREATER THAN 6	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE
401	1+11.82	4' STANDARD	490122.053	1493084.570	766.6	8	760.73	5.86	-	8	760.83	5.76	171°29'27"				
402	2+11.16	4' STANDARD	490213.462	1493045.588	767.0	8	761.50	5.47	-	8	761.60	5.37	-				

-SS-5-

MANHOLE SCHEDULE

MANHOLE LOCATION						OUTFLOW PIPE (DIAMETER AND DEPTH)				INFLOW PIPES (DIAMETER , DEPTH, ANGLE FROM OUTFLOW PIPE)							
										PIPE 1				PIPE 2			
MH ID	STATION	MANHOLE TYPE	NORTHING	EASTING	RIM ELEV. FT	DIA. IN.	Invert Elev. FT.	DEPTH TO INV. FT	GREATER THAN 6	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE	DIA. IN.	Invert Elev. ft.	DEPTH TO INV. FT	ANGLE
501	0+47.05	4' STANDARD	488210.983	1494408.246	753.4	8	740.28	13.12	7.1	8	740.48	12.92	90°10'59"				
502	3+76.83	4' STANDARD	488472.642	1494207.525	756.3	8	742.1	14.20	8.2	8	742.3	14.00	176°45'57"				
503	5+59.57	4' STANDARD	488611.133	1494088.288	754.7	8	743.2	11.50	5.5	8	743.4	11.30	174°26'48"				
504	8+63.96	4' STANDARD	488859.941	1493912.939	756.0	8	744.9	11.10	5.1	8	745.1	10.90	105°32'52"				
505	9+26.42	4' STANDARD	488838.963	1493854.113	755.5	8	745.39	10.11	4.1	8	745.59	9.91	118°07'56"				
506	11+04.42	4' STANDARD	488958.628	1493722.331	755.9	8	747.19	8.71	2.7	8	747.39	8.51	178°17'12"				
507	13+53.07	4' STANDARD	489120.199	1493533.341	760.7	8	749.63	11.07	5.1	8	749.83	10.87	178°03'38"				
508	15+74.30	4' STANDARD	489258.186	1493360.415	763.1	8	755.14	7.96	2.0	8	756.79	6.31	178°51'03"				

8/17/99

NOTES:

1. PROPOSED WATER LINE SHALL HAVE 18" VERTICAL SEPARATION FROM PROPOSED DRY UTILITIES UNLESS OTHERWISE SHOWN (SEE PROFILES).
2. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
3. EXACT PLACEMENT OF THE RPZ SHALL BE COORDINATED BETWEEN NCDOT AND CONTRACTOR.
4. CONTRACTOR TO COORDINATE WITH ALL BUSINESS OWNERS ON WATER SERVICE TIE-INS.
5. SEE SHEET UC-9 FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
6. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE AND 6" GATE VALVE.
7. SEE SHEET UC-5 FOR LOCATION OF EXISTING METER.

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-4
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

UTILITIES ENGINEERING SEC.
PHONE: (919)707-6690
FAX: (919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO P. MENENDEZ

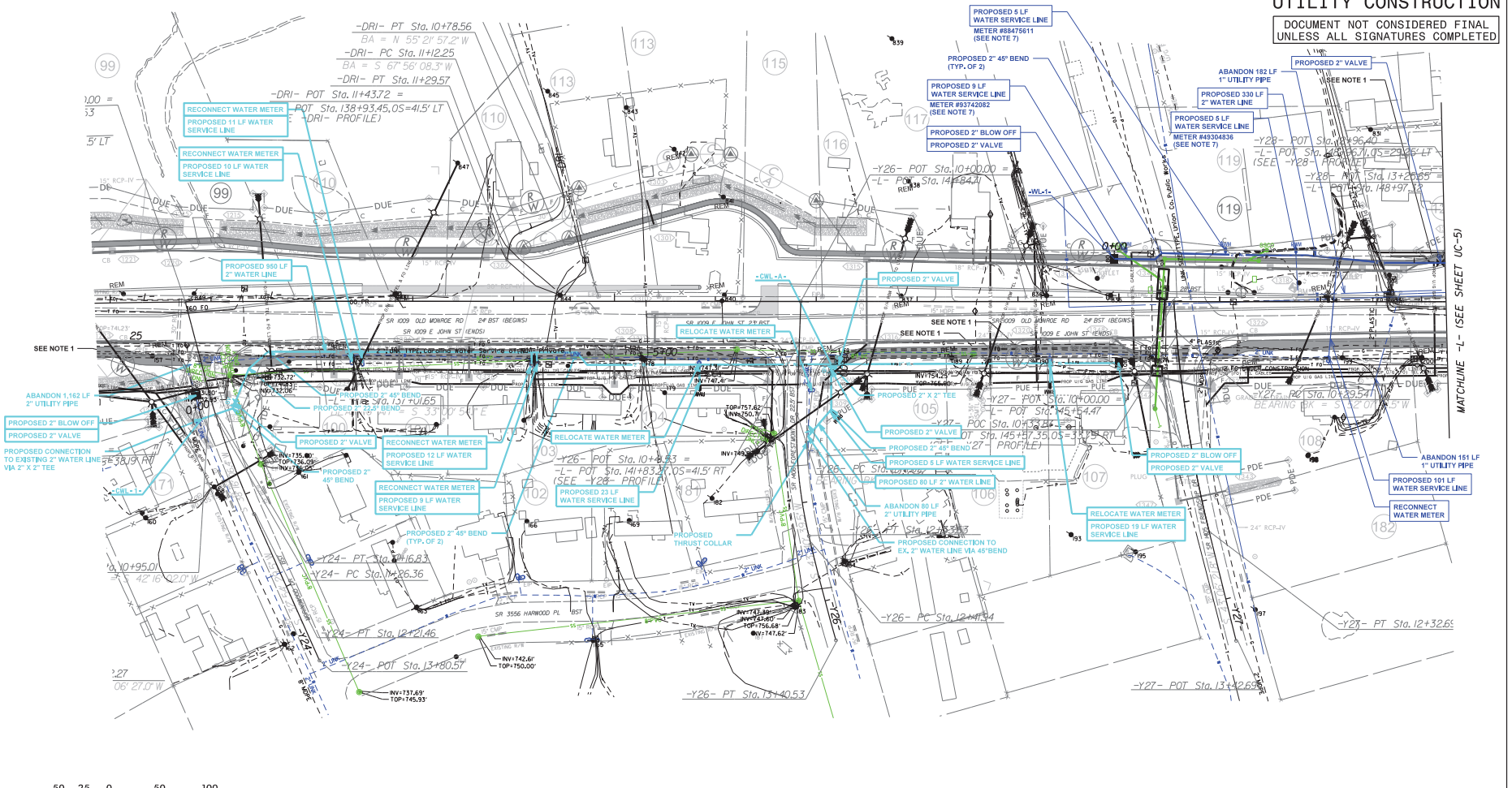
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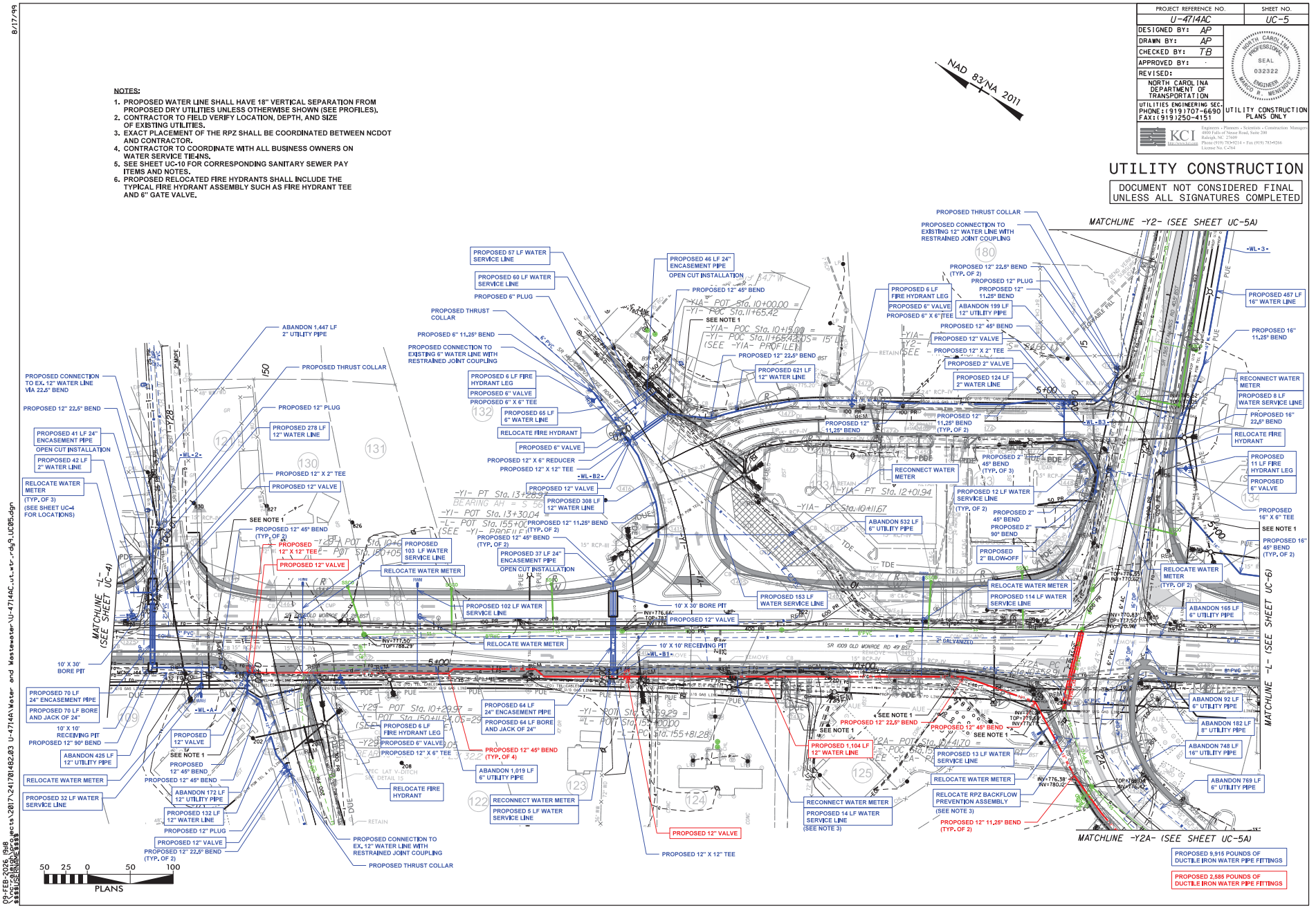
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NOTES:
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3. EXACT PLACEMENT OF THE RPZ SHALL BE COORDINATED BETWEEN NCDOT AND CONTRACTOR.
4. CONTRACTOR TO COORDINATE WITH ALL BUSINESS OWNERS ON WATER SERVICE TIE-INS.
5. SEE SHEET UC-10 FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
6. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE AND 6" GATE VALVE.
NAD 83/NA 2011
PROJECT REFERENCE NO. U-4714AC
SHEET NO. UC-5
DESIGNED BY: AP
DRAWN BY: AP
CHECKED BY: TB
APPROVED BY:
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MATCHLINE -Y2- (SEE SHEET UC-5A)
MATCHLINE -L- (SEE SHEET UC-4)
MATCHLINE -L- (SEE SHEET UC-6)
MATCHLINE -Y2A- (SEE SHEET UC-5A)
PROPOSED 9,915 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS
PROPOSED 2,585 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS
50 25 0 50 100
PLANS
8/17/99
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8/17/99

NOTES:

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3. EXACT PLACEMENT OF THE RPZ SHALL BE COORDINATED BETWEEN NCDOT AND CONTRACTOR.
4. CONTRACTOR TO COORDINATE WITH ALL BUSINESS OWNERS ON WATER SERVICE TIE-INS.
5. CONTRACTOR TO LOCATE EXISTING 6" FIRE LINE, ABANDON AND PLUG AS NECESSARY, AND RECONNECT TO PROPOSED 12" WATER LINE.
6. SEE SHEET UC-10A FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
7. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE 6" GATE VALVE.

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-5A
DESIGNED BY: AP	
DRAWN BY: AP	
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APPROVED BY:	
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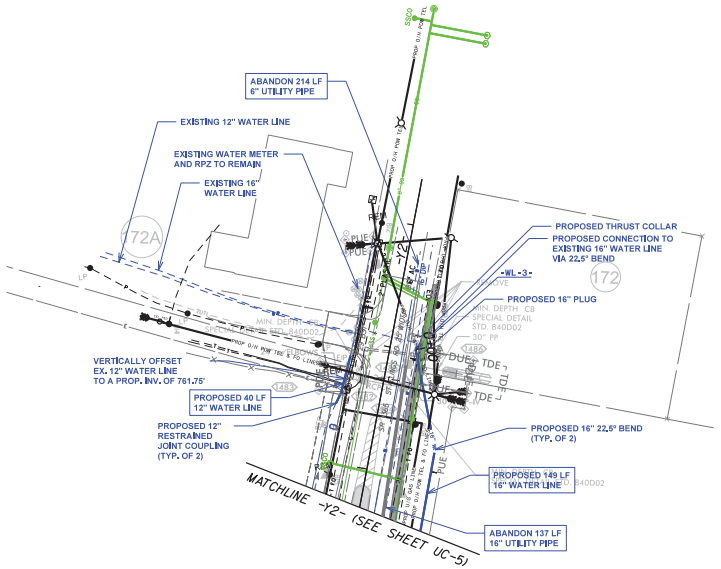
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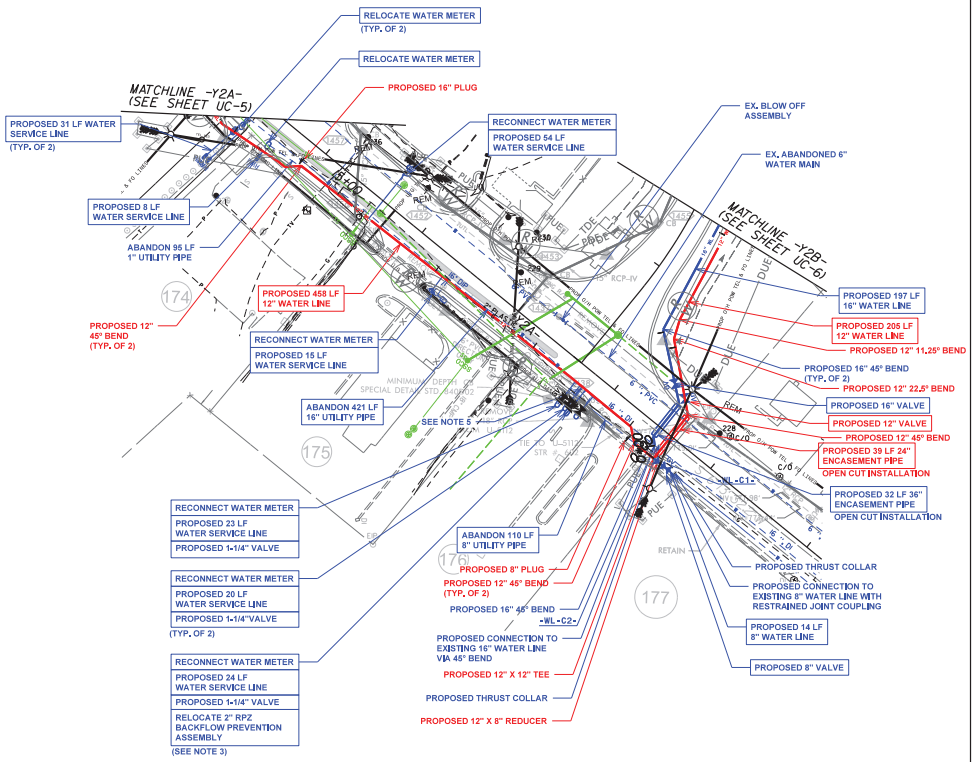
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50 25 0 50 100
PLANS

PROPOSED 4,755 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

PROPOSED 2,090 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-6
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	

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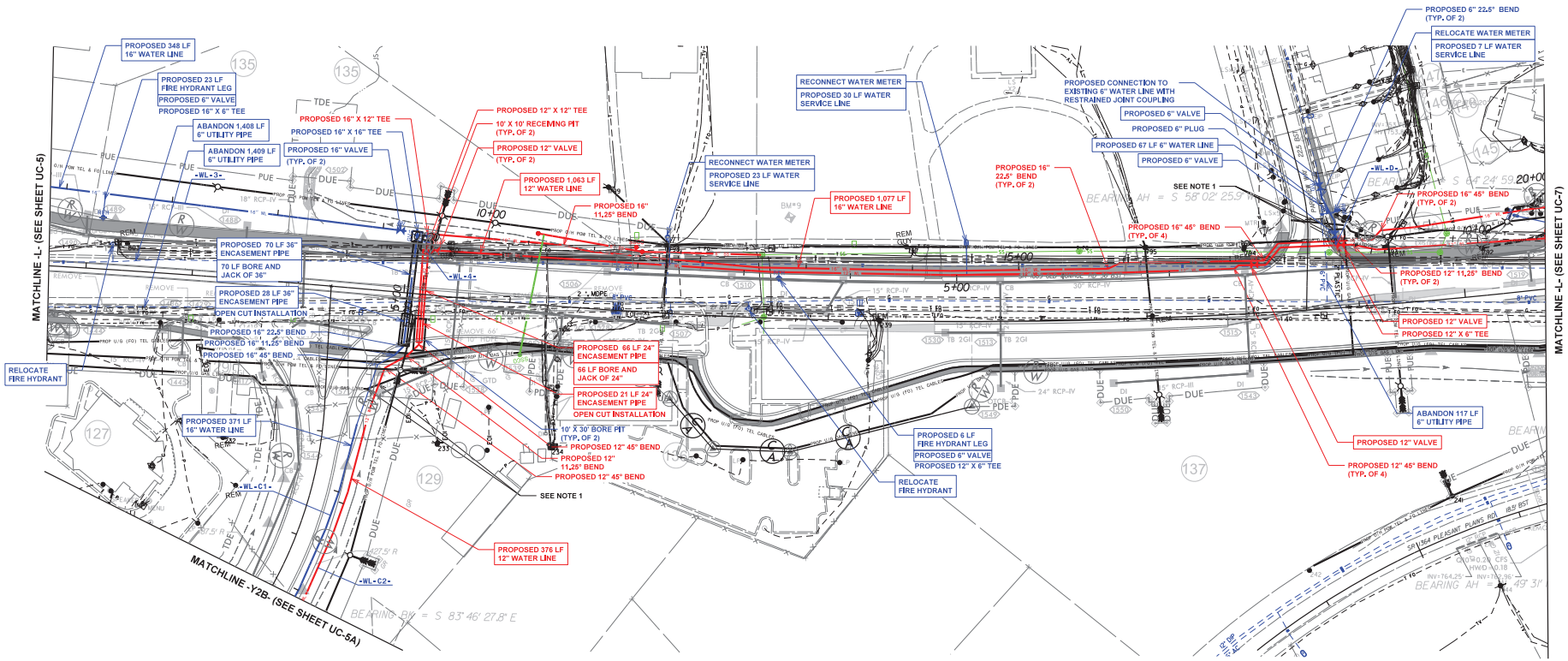
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NOTES:

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4. SEE SHEET UC-11 FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
5. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE AND 6" GATE VALVE.

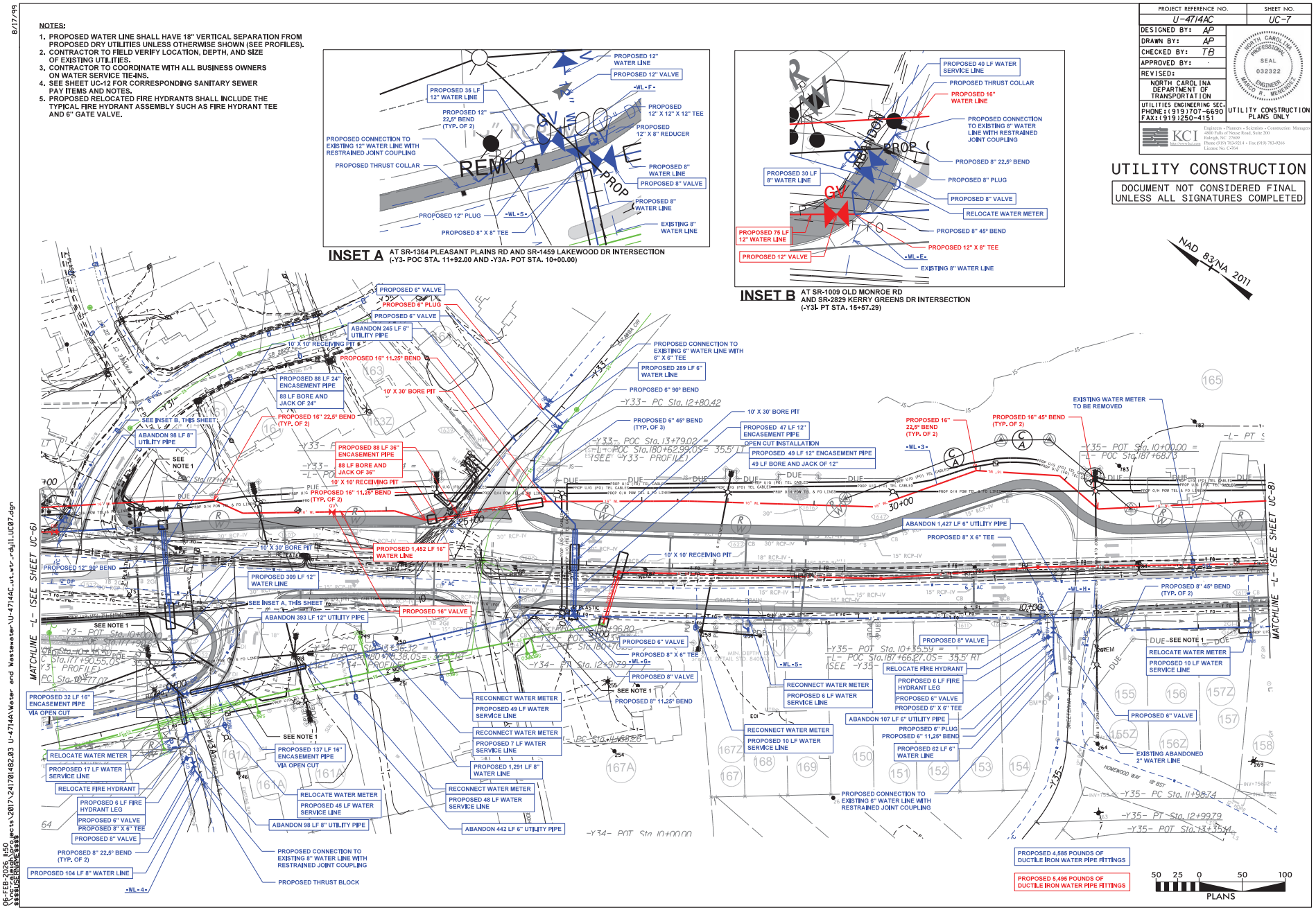
NAD 83/NA 2011



PROPOSED 3,625 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

PROPOSED 7,210 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

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NOTES:
1. PROPOSED WATER LINE SHALL HAVE 18" VERTICAL SEPARATION FROM PROPOSED DRY UTILITIES UNLESS OTHERWISE SHOWN (SEE PROFILES).
2. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
3. CONTRACTOR TO COORDINATE WITH ALL BUSINESS OWNERS ON WATER SERVICE TIE-INS.
4. SEE SHEET UC-12 FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
5. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE AND 6" GATE VALVE.
INSET A
AT SR-1364 PLEASANT PLAINS RD AND SR-1459 LAKEWOOD DR INTERSECTION
(-Y3- POC STA. 11+92.00 AND -Y3A- POT STA. 10+00.00)
INSET B
AT SR-1009 OLD MONROE RD
AND SR-2829 KERRY GREENS DR INTERSECTION
(-Y3B- PT STA. 15+57.29)
PROJECT REFERENCE NO. U-4714AC
SHEET NO. UC-7
DESIGNED BY: AP
DRAWN BY: AP
CHECKED BY: TB
APPROVED BY:
REVISED:
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NAD 83/NA 2011
MATCHLINE -L- (SEE SHEET UC-6)
MATCHLINE -L- (SEE SHEET UC-8)
PROPOSED 4,585 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS
PROPOSED 5,495 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS
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PLANS
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8/17/99

NOTES:

1. PROPOSED WATER LINE SHALL HAVE 18" VERTICAL SEPARATION FROM PROPOSED DRY UTILITIES UNLESS OTHERWISE SHOWN (SEE PROFILES).
2. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
3. SEE SHEET UC-13 FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
4. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE AND 6" GATE VALVE.

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-8
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY: -	
REVISED:	

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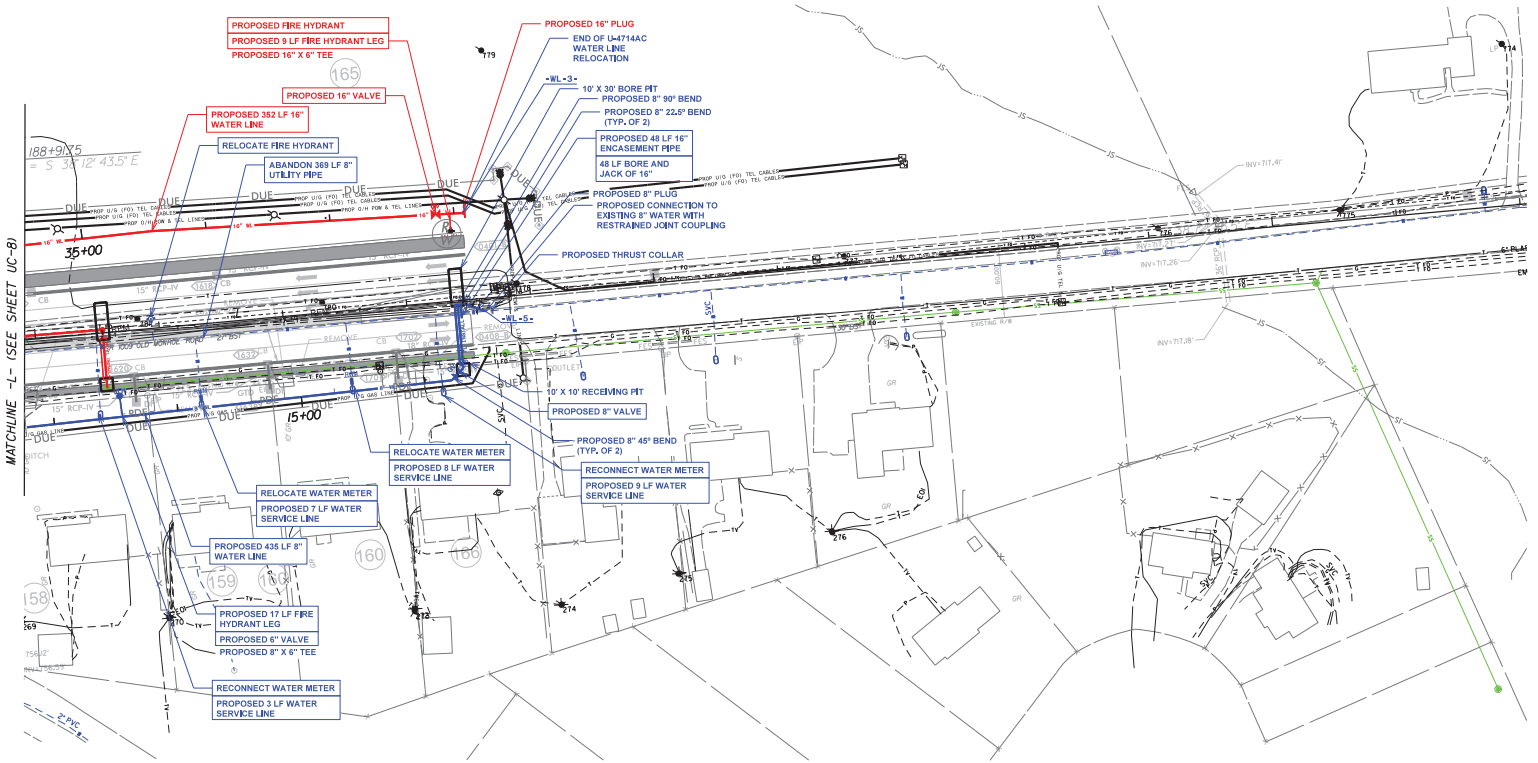
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PROPOSED 1,090 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

PROPOSED 685 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

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NOTES:

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3. EXACT PLACEMENT OF THE RPZ SHALL BE COORDINATED BETWEEN NCDOT AND CONTRACTOR.
4. CONTRACTOR TO COORDINATE WITH ALL BUSINESS OWNERS ON WATER SERVICE TIE-INS.
5. CONTRACTOR TO LOCATE EXISTING 6" FIRE LINE, ABANDON AND PLUG AS NECESSARY, AND RECONNECT TO PROPOSED 12" WATER LINE.
6. SEE SHEET UC-10A FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
7. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE 6" GATE VALVE.

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-5A
DESIGNED BY: AP	
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APPROVED BY:	
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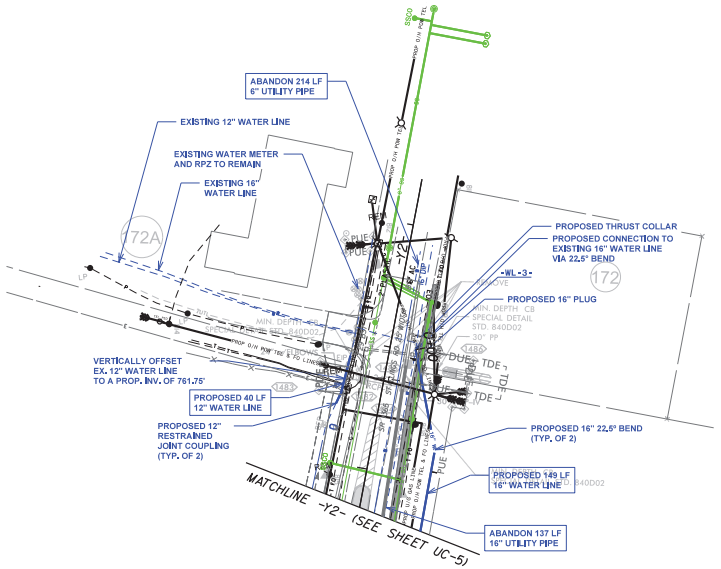
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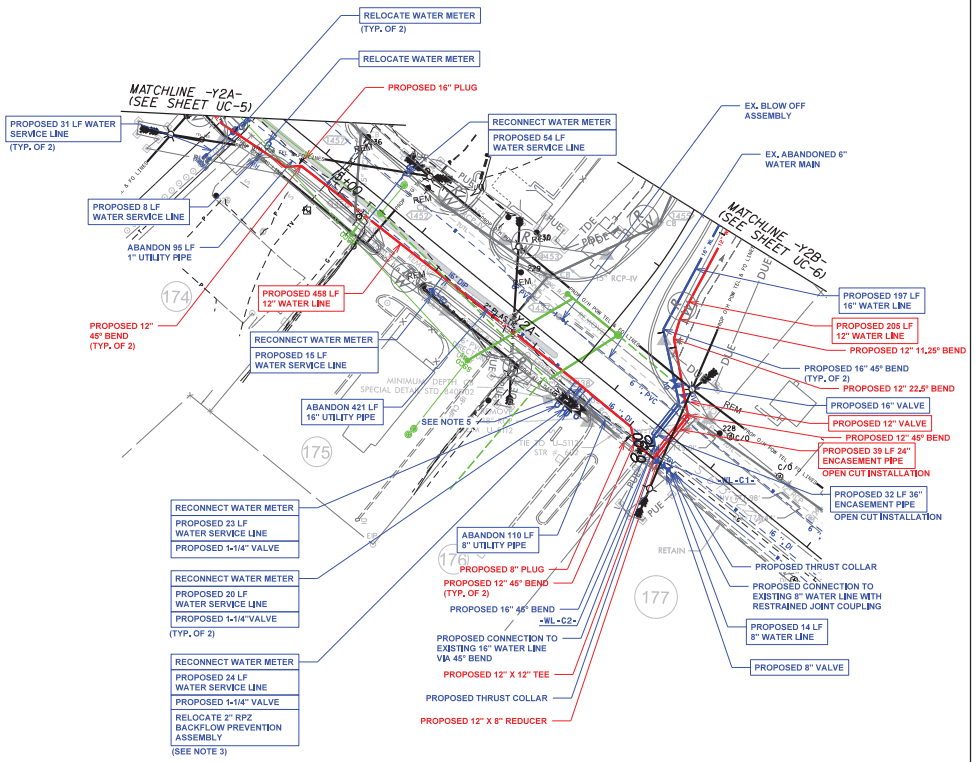
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50 25 0 50 100
PLANS

PROPOSED 4,755 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

PROPOSED 2,090 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

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8/17/99

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-6
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	

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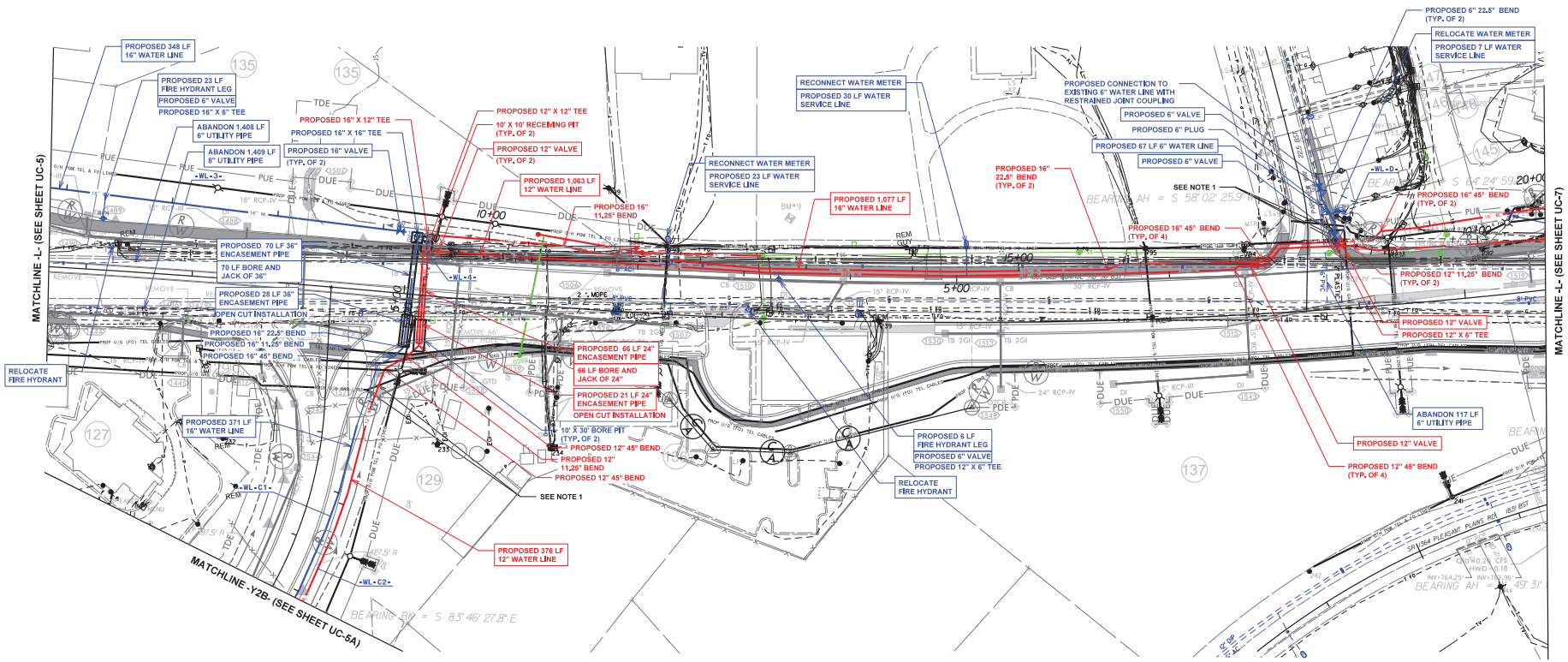
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NOTES:

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4. SEE SHEET UC-11 FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
5. PROPOSED RELOCATED FIRE HYDRANTS SHALL INCLUDE THE TYPICAL FIRE HYDRANT ASSEMBLY SUCH AS FIRE HYDRANT TEE AND 6" GATE VALVE.

NAD 83/NA 2011



PROPOSED 3,625 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

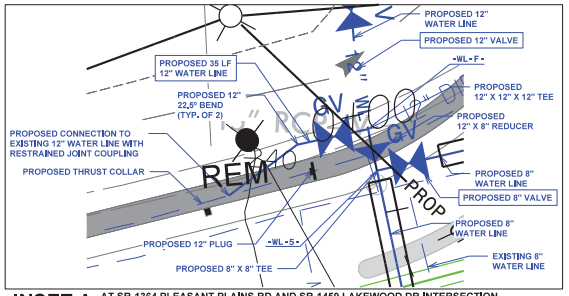
PROPOSED 7,210 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

06-FEB-2026 17:08
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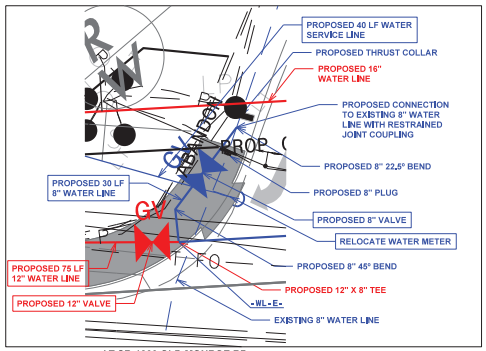
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4. SEE SHEET UC-12 FOR CORRESPONDING SANITARY SEWER PAY ITEMS AND NOTES.
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INSET A AT SR-1364 PLEASANT PLAINS RD AND SR-1459 LAKEWOOD DR INTERSECTION
(-Y3- POC STA. 11+92.00 AND -Y3A- POT STA. 10+00.00)



INSET B AT SR-1009 OLD MONROE RD
AND SR-2829 KERRY GREENS DR INTERSECTION
(-Y3I- PT STA. 15+57.29)

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-7
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
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REVISED:	

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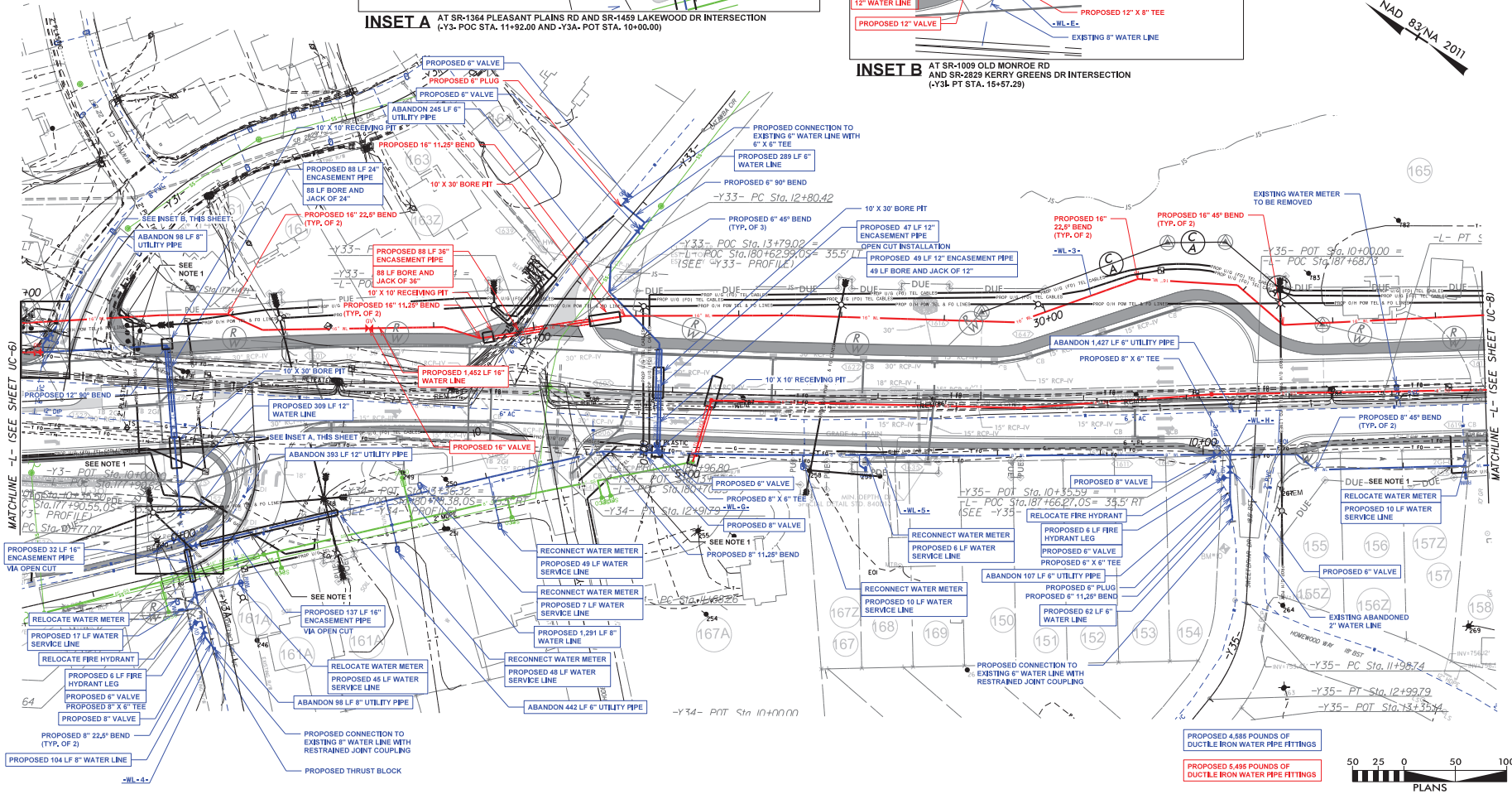
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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-8
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APPROVED BY: -	
REVISED:	

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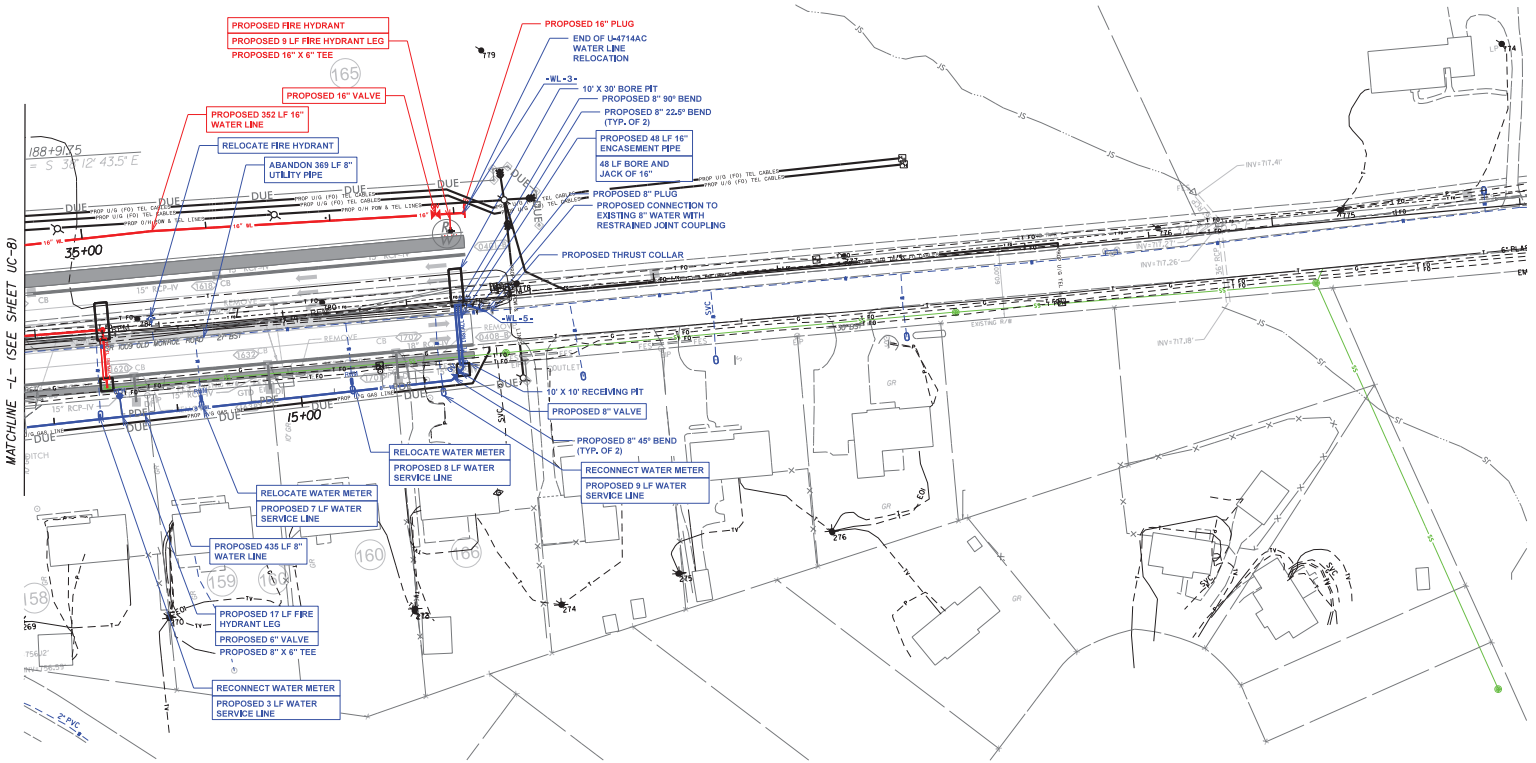
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PROPOSED 1,090 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

PROPOSED 685 POUNDS OF DUCTILE IRON WATER PIPE FITTINGS

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$$$$USERNAME$$$$

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-9
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCUS R. MEMERING

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UTILITY CONSTRUCTION

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NOTES:

1. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
2. SEE SHEET UC-4 FOR CORRESPONDING WATER LINE PAY ITEMS AND NOTES.
3. CONTRACTOR TO REMOVE EXISTING INTERCEPTOR TANK AND INSTALL/CONNECT THE SEWER SERVICE LINE AS SHOWN IN STANDARD DETAIL ON SHEET UC-3G.

NAD 83/NA 2011

PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 1.5 LF UTILITY MANHOLE WALL 4' DIA
SSMH=102
-SS-1- STA. 1+48.84
PROP. RIM = 776.3
PROP. 8" INV. OUT = 769.00
PROP. 8" INV. IN = 768.80

PROPOSED 62 LF SEWER SERVICE LINE
GENERIC UTILITY ITEM (SEE NOTE 3)
PROPOSED SANITARY SEWER CLEAN-OUT

10' X 30' BORE PIT

PROPOSED 93 LF 8" SANITARY GRAVITY SEWER
PROPOSED 12 LF 16" ENCASEMENT PIPE
OPEN CUT INSTALLATION
PROPOSED SANITARY SEWER CLEAN-OUT
PROPOSED 27 LF SEWER SERVICE LINE

PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 2.2 LF UTILITY MANHOLE WALL 4' DIA
SSMH=103
-SS-1- STA. 2+42.08
PROP. RIM = 779.2
PROP. 8" INV. OUT = 771.0

PROPOSED 68 LF 16" ENCASEMENT PIPE
PROPOSED 68 LF BORE AND JACK OF 16"
GENERIC UTILITY ITEM (SEE NOTE 3)
10' X 10' RECIEVING PIT

PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 2.9 LF UTILITY MANHOLE WALL 4' DIA
SSMH=101
-SS-1- STA. 0+00
PROP. RIM = 771.10
PROP. 8" INV. IN = 762.27

PROPOSED 149 LF 8" SANITARY GRAVITY SEWER

EX. 4" SS (SEE NOTE 1)

MATCHLINE -L- (SEE SHEET UC-10)

50 25 0 50 100
PLANS

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8/17/99

NOTES:

1. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
2. SEE SHEET UC-5 FOR CORRESPONDING WATER LINE PAY ITEMS AND NOTES.
3. CONTRACTOR TO ADJUST AND ROTATE EXISTING SANITARY SEWER MANHOLE (SSMH) SUCH THAT THE SSMH CASTING IS NOT IN THE PROPOSED CURB. CONTRACTOR TO ALSO PROVIDE SOLID LID IF GUTTER FLOW WILL CROSS THE SSMH.

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-10
DESIGNED BY: AP	
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REVISED:	

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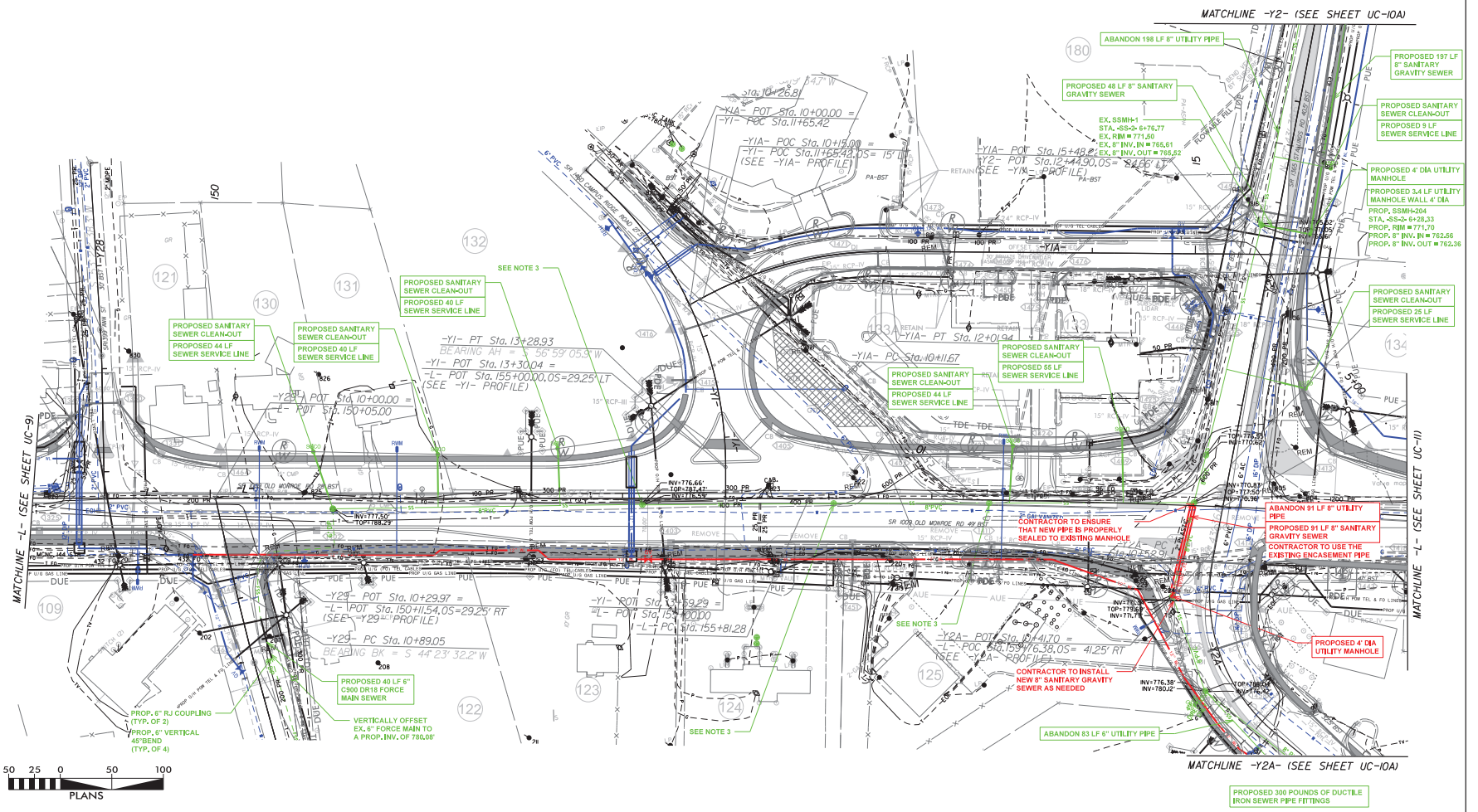
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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-10A
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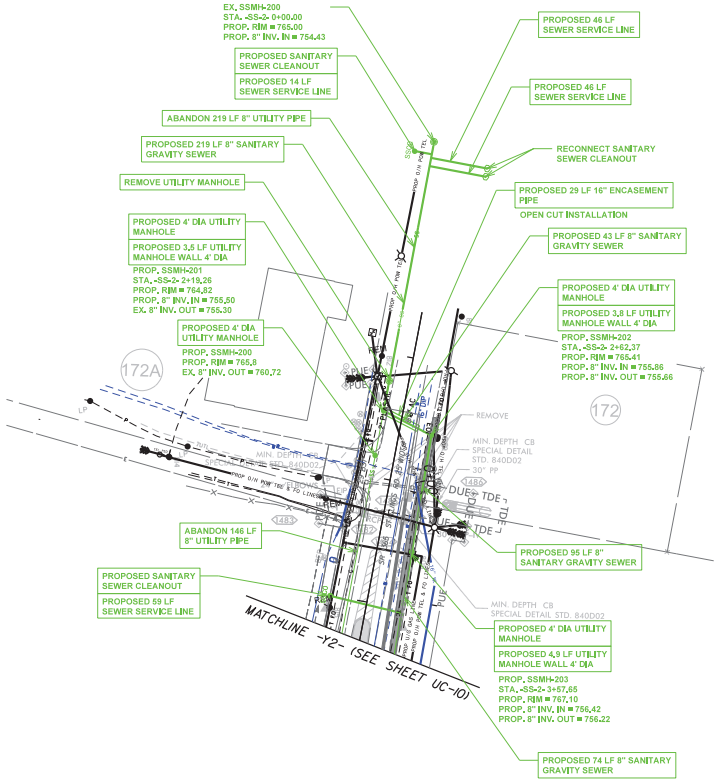
UTILITY CONSTRUCTION

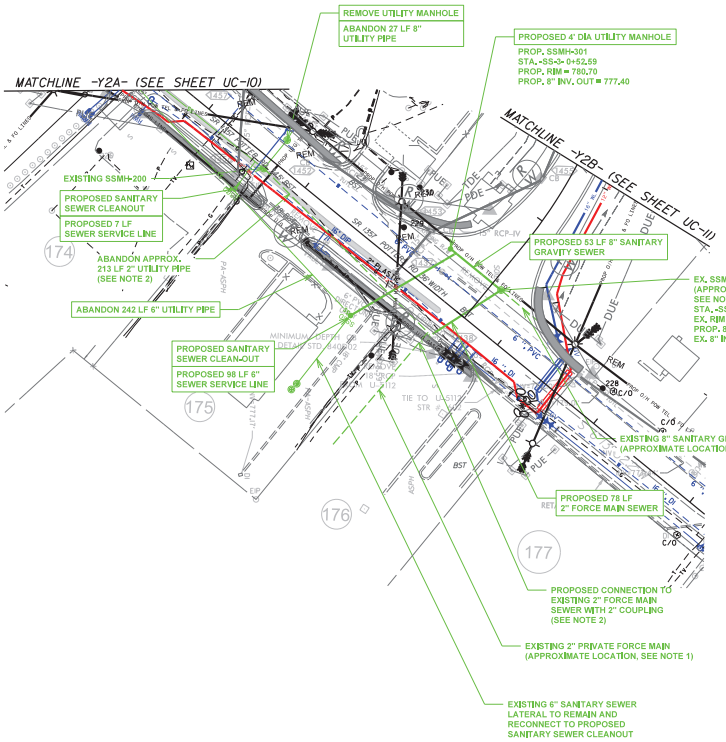
DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

NOTES:

1. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
2. CONTRACTOR TO REDIRECT EXISTING 2" FORCE MAIN FROM EXISTING SSMH-200 TO EXISTING SSMH-2. CONTRACTOR SHALL LOCATE EXISTING 2" FORCE MAIN AND ADJUST IT TO CONNECT WITH THE PROPOSED 2" FORCE MAIN.
3. SEE SHEET UC-5A FOR CORRESPONDING WATER LINE PAY ITEMS AND NOTES.

NAD 83/NA 2011





50 25 0 50 100
PLANS

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$$$$USERNAME$$$$

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-11
DESIGNED BY: AP	
DRAWN BY: AP	
CHECKED BY: TB	
APPROVED BY: -	
REVISED:	

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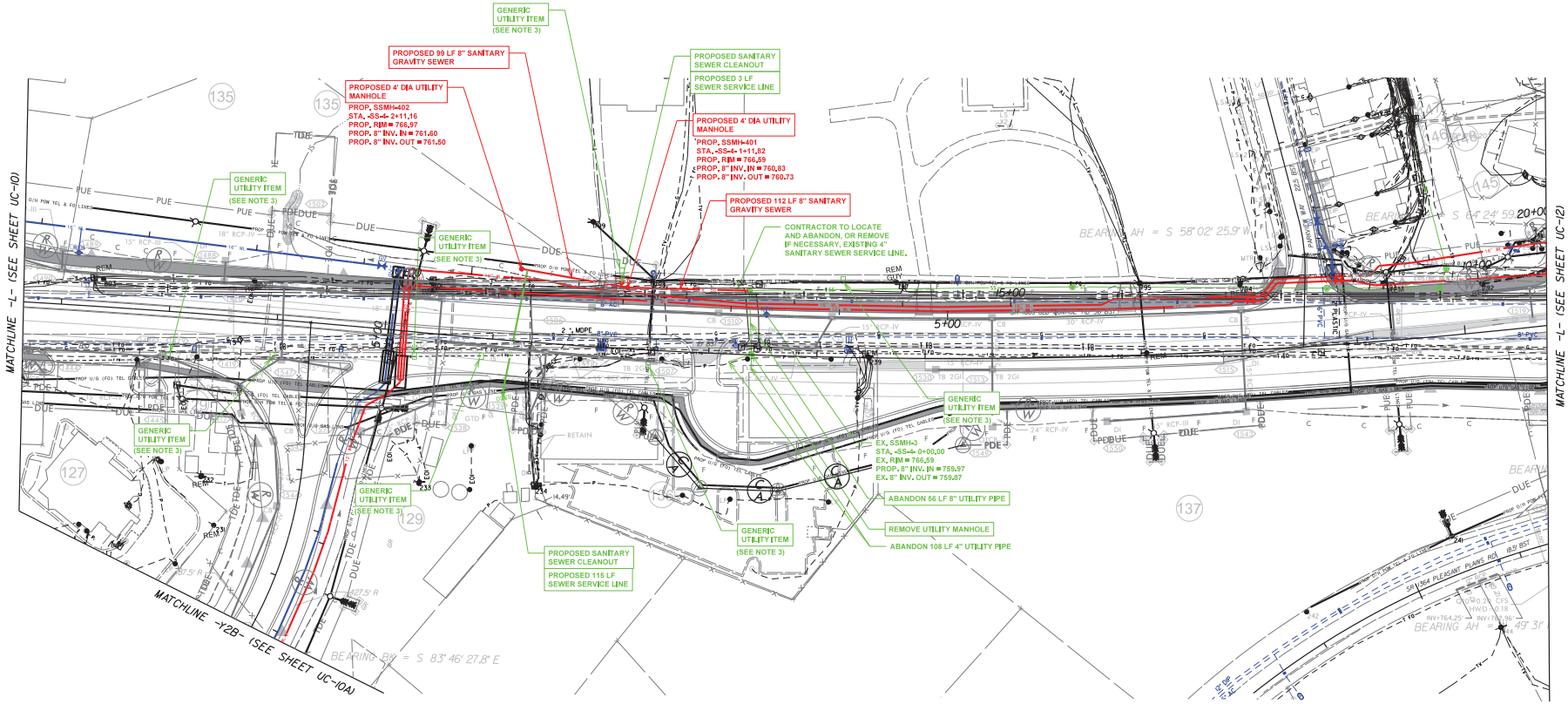
UTILITY CONSTRUCTION

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NOTES:

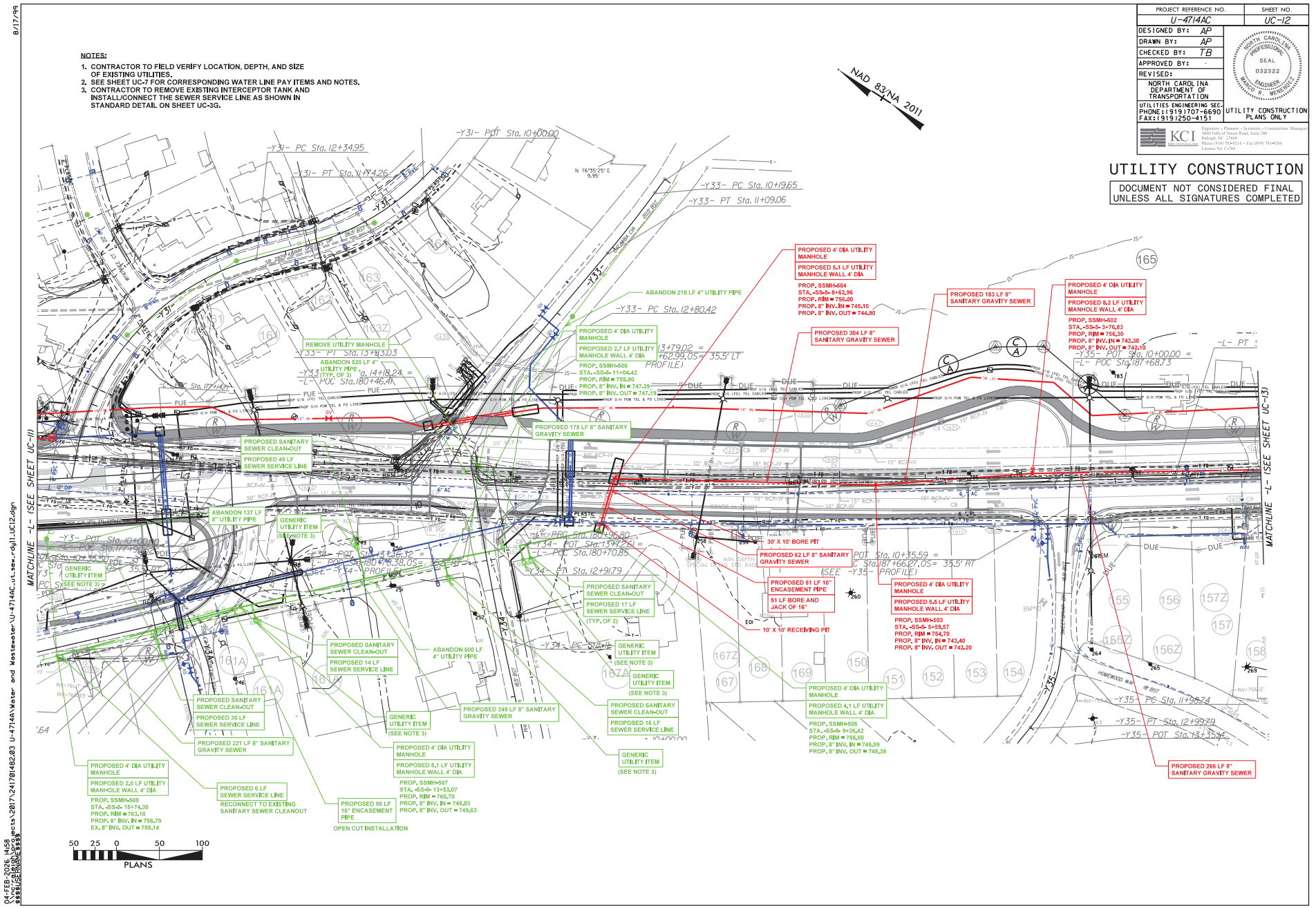
1. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
2. SEE SHEET UC-6 FOR CORRESPONDING WATER LINE PAY ITEMS AND NOTES.
3. CONTRACTOR TO REMOVE EXISTING INTERCEPTOR TANK AND INSTALL/CONNECT THE SEWER SERVICE LINE AS SHOWN IN STANDARD DETAIL ON SHEET UC-3G.



50 25 0 50 100
PLANS

26-JAN-2026 19:41
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$$$$USERNAME$$$$

8/17/99


NOTES:
1. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
2. SEE SHEET UC-7 FOR CORRESPONDING WATER LINE PAY ITEMS AND NOTES.
3. CONTRACTOR TO REMOVE EXISTING INTERCEPTOR TANK AND INSTALL/CONNECT THE SEWER SERVICE LINE AS SHOWN IN STANDARD DETAIL ON SHEET UC-3G.
NAD 83/NA 2011
PROJECT REFERENCE NO. U-4714AC
SHEET NO. UC-12
DESIGNED BY: AP
DRAWN BY: AP
CHECKED BY: TB
APPROVED BY:
REVISED:
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UTILITY CONSTRUCTION
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MATCHLINE -L- (SEE SHEET UC-11)
MATCHLINE -L- (SEE SHEET UC-13)
PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 5.1 LF UTILITY MANHOLE WALL 4' DIA
PROP. SSMH=504
STA. -SS-5- 8+63.96
PROP. RIM = 756.00
PROP. 8" INV. IN = 745.10
PROP. 8" INV. OUT = 744.90
PROPOSED 183 LF 8" SANITARY GRAVITY SEWER
PROPOSED 304 LF 8" SANITARY GRAVITY SEWER
PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 8.2 LF UTILITY MANHOLE WALL 4' DIA
PROP. SSMH=502
STA. -SS-5- 3+76.83
PROP. RIM = 756.30
PROP. 8" INV. IN = 742.30
PROP. 8" INV. OUT = 742.10
ABANDON 210 LF 4" UTILITY PIPE
REMOVE UTILITY MANHOLE
ABANDON 520 LF 4" UTILITY PIPE (TYP. OF 3)
PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 2.7 LF UTILITY MANHOLE WALL 4' DIA
PROP. SSMH=506
STA. -SS-5- 11+04.42
PROP. RIM = 755.90
PROP. 8" INV. IN = 747.29
PROP. 8" INV. OUT = 747.19
PROPOSED 178 LF 8" SANITARY GRAVITY SEWER
PROPOSED SANITARY SEWER CLEAN-OUT
PROPOSED 49 LF SEWER SERVICE LINE
ABANDON 137 LF 8" UTILITY PIPE
GENERIC UTILITY ITEM (SEE NOTE 3)
30' X 10' BORE PIT
PROPOSED 62 LF 8" SANITARY GRAVITY SEWER
PROPOSED 51 LF 16" ENCASEMENT PIPE
51 LF BORE AND JACK OF 16"
10' X 10' RECEIVING PIT
PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 5.5 LF UTILITY MANHOLE WALL 4' DIA
PROP. SSMH=503
STA. -SS-5- 5+59.57
PROP. RIM = 754.70
PROP. 8" INV. IN = 743.40
PROP. 8" INV. OUT = 743.20
PROPOSED SANITARY SEWER CLEAN-OUT
PROPOSED 17 LF SEWER SERVICE LINE (TYP. OF 2)
ABANDON 600 LF 4" UTILITY PIPE
PROPOSED SANITARY SEWER CLEAN-OUT
PROPOSED 14 LF SEWER SERVICE LINE
PROPOSED SANITARY SEWER CLEAN-OUT
PROPOSED 30 LF SEWER SERVICE LINE
PROPOSED 221 LF 8" SANITARY GRAVITY SEWER
PROPOSED 249 LF 8" SANITARY GRAVITY SEWER
PROPOSED SANITARY SEWER CLEAN-OUT
PROPOSED 16 LF SEWER SERVICE LINE
PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 4.1 LF UTILITY MANHOLE WALL 4' DIA
PROP. SSMH=505
STA. -SS-5- 9+26.42
PROP. RIM = 755.50
PROP. 8" INV. IN = 745.59
PROP. 8" INV. OUT = 745.39
PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 2.0 LF UTILITY MANHOLE WALL 4' DIA
PROP. SSMH=508
STA. -SS-5- 15+74.30
PROP. RIM = 763.10
PROP. 8" INV. IN = 756.79
EX. 8" INV. OUT = 755.14
PROPOSED 6 LF SEWER SERVICE LINE
RECONNECT TO EXISTING SANITARY SEWER CLEANOUT
PROPOSED 98 LF 16" ENCASEMENT PIPE
OPEN CUT INSTALLATION
PROPOSED 4' DIA UTILITY MANHOLE
PROPOSED 5.1 LF UTILITY MANHOLE WALL 4' DIA
PROP. SSMH=507
STA. -SS-5- 13+53.07
PROP. RIM = 760.70
PROP. 8" INV. IN = 749.83
PROP. 8" INV. OUT = 749.63
PROPOSED 266 LF 8" SANITARY GRAVITY SEWER
50 25 0 50 100
PLANS
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$$$$USERNAME$$$$

8/17/99

NOTES:

1. CONTRACTOR TO FIELD VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
2. SEE SHEET UC-8 FOR CORRESPONDING WATER LINE PAY ITEMS AND NOTES.

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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-13
DESIGNED BY: AP	
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APPROVED BY: -	
REVISED:	

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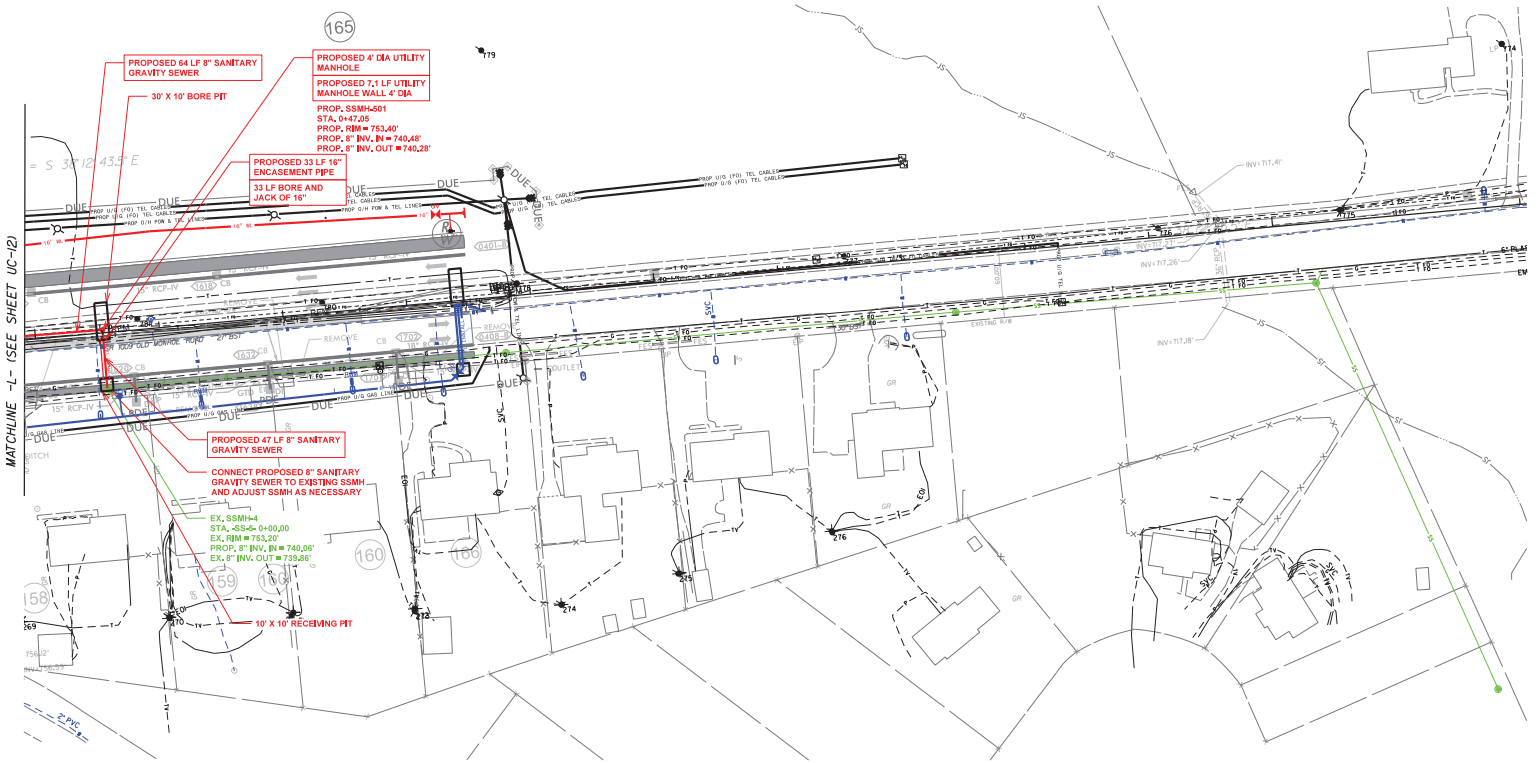
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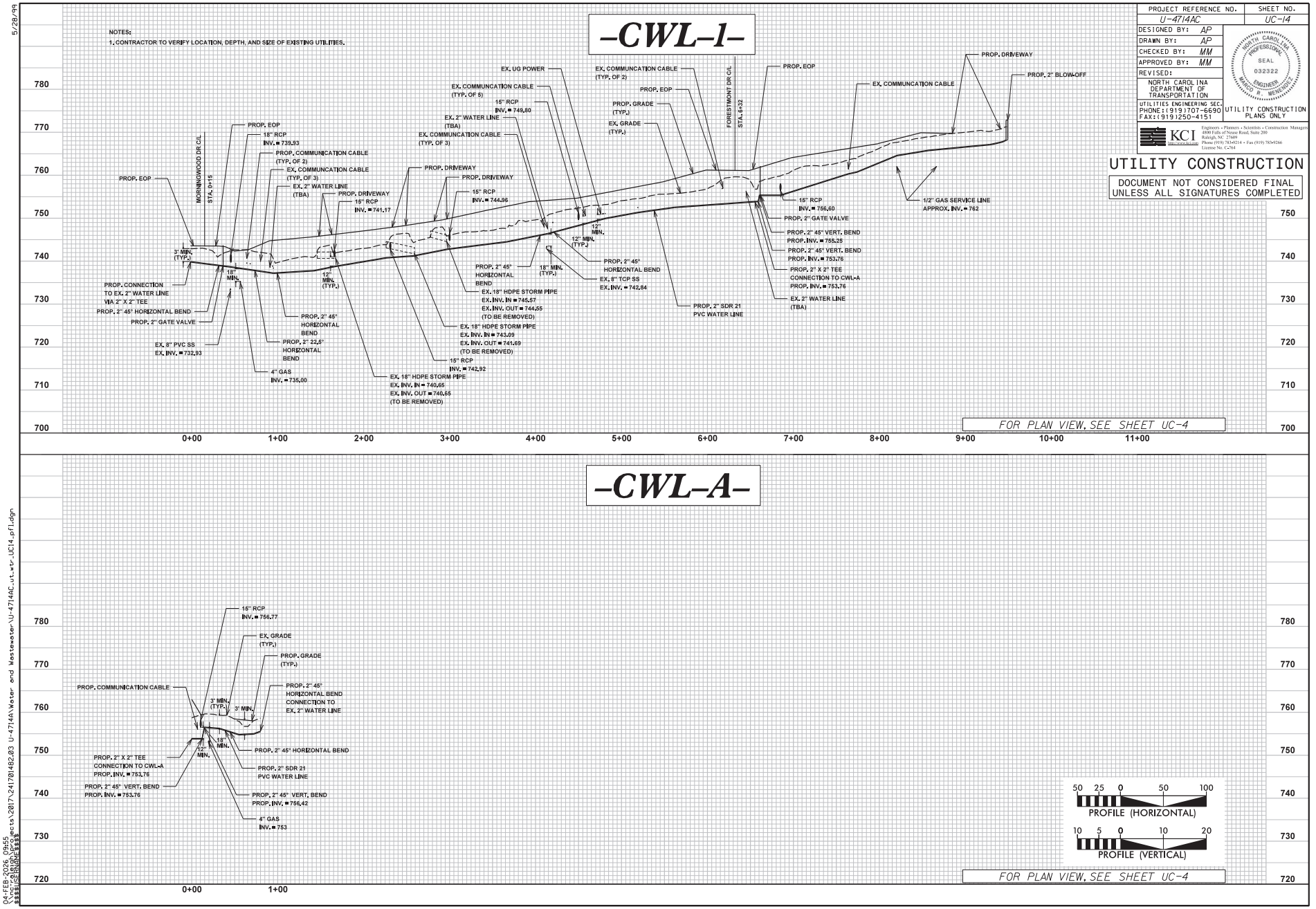
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PLANS

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$$$$USERNAME$$$$



PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-14
DESIGNED BY: AP	
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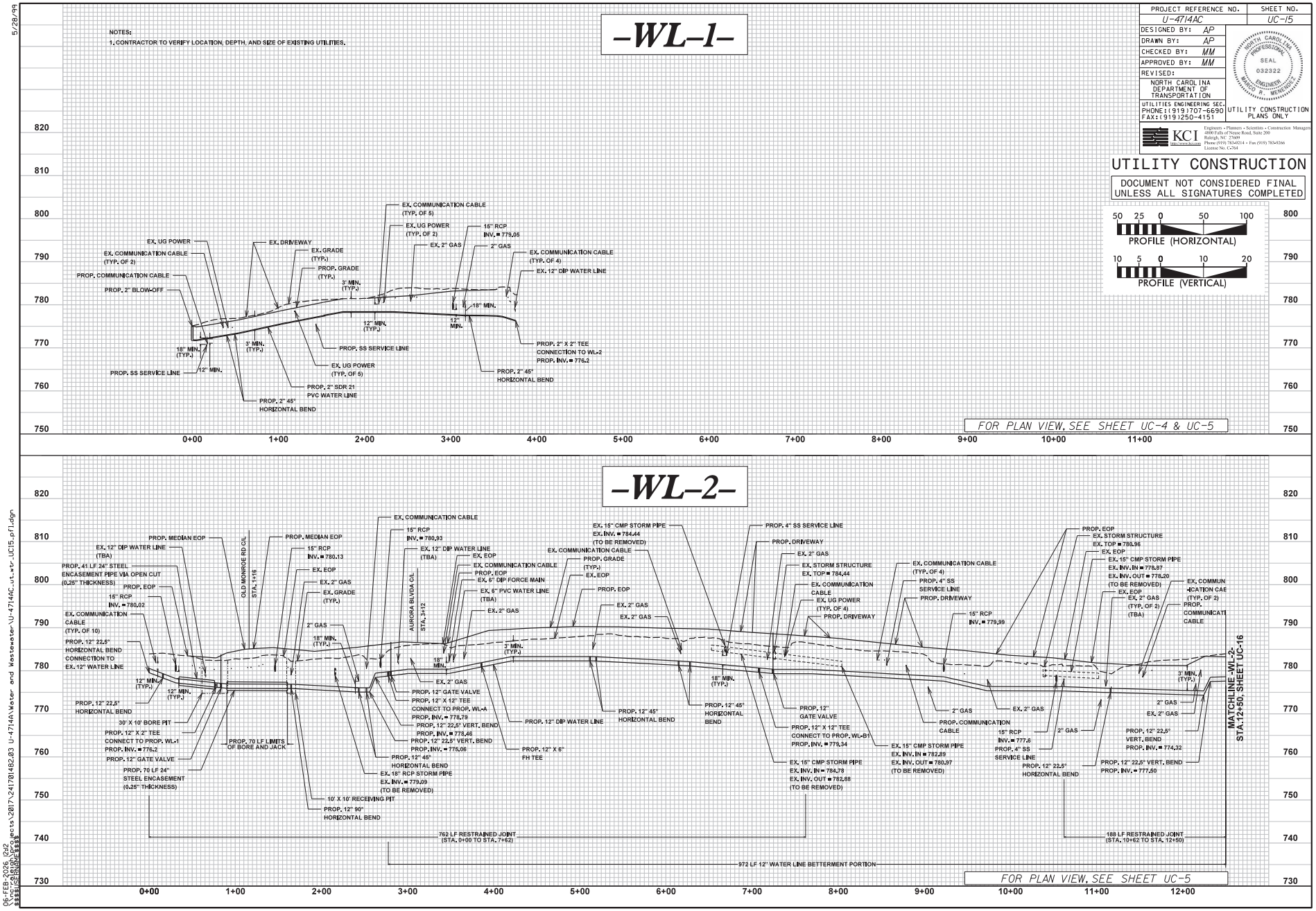
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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-15
DESIGNED BY: AP	
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APPROVED BY: MM	
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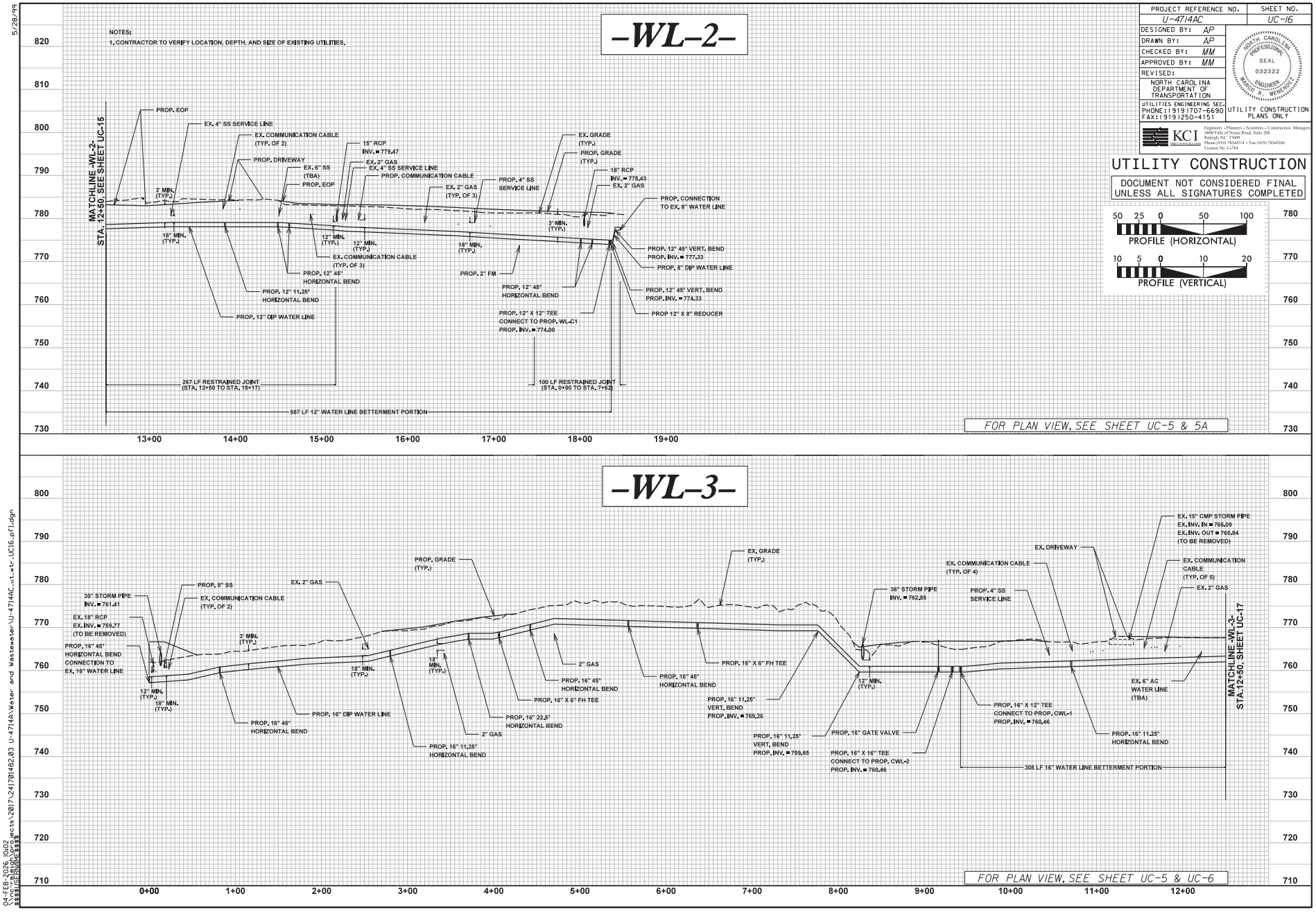
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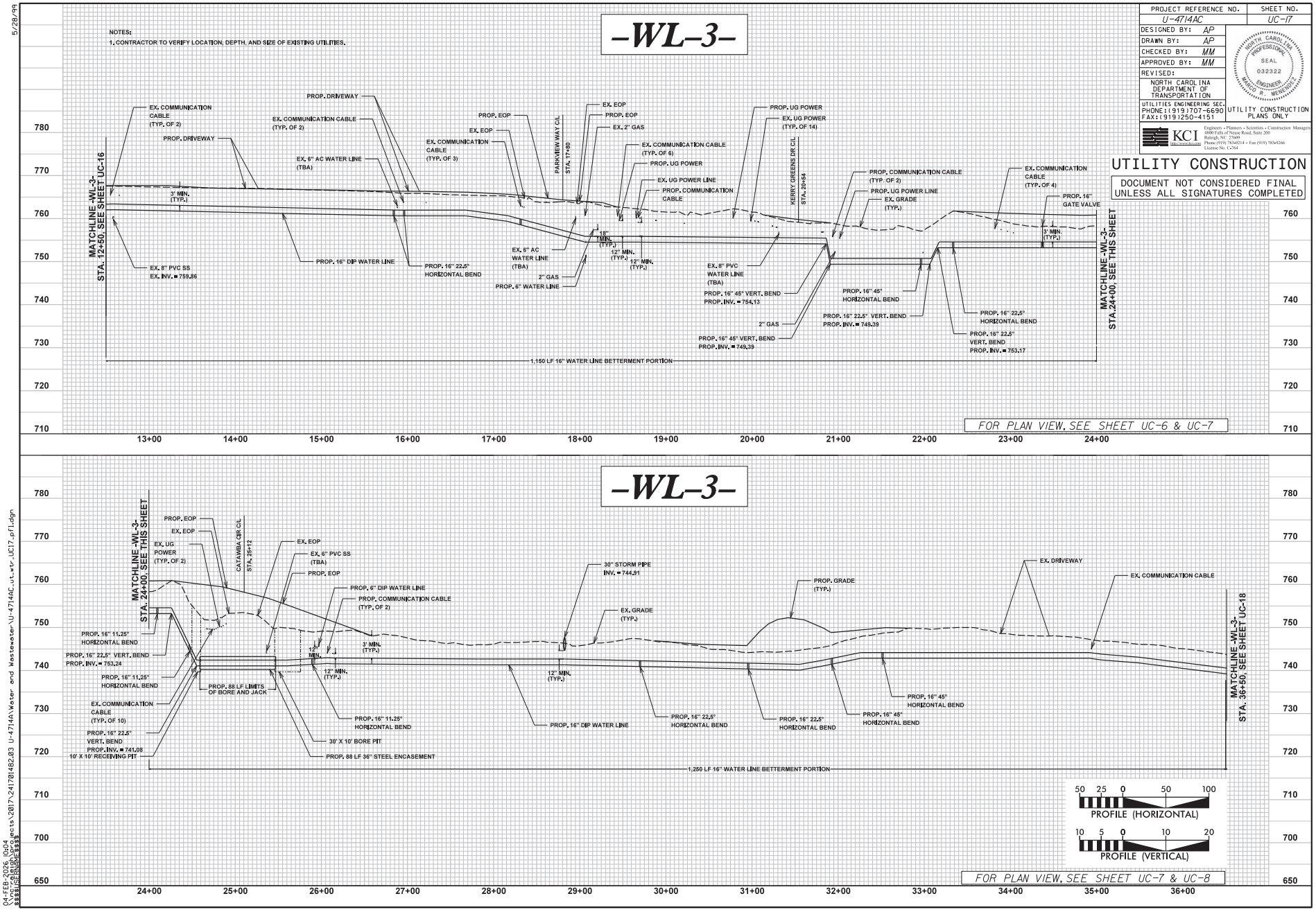
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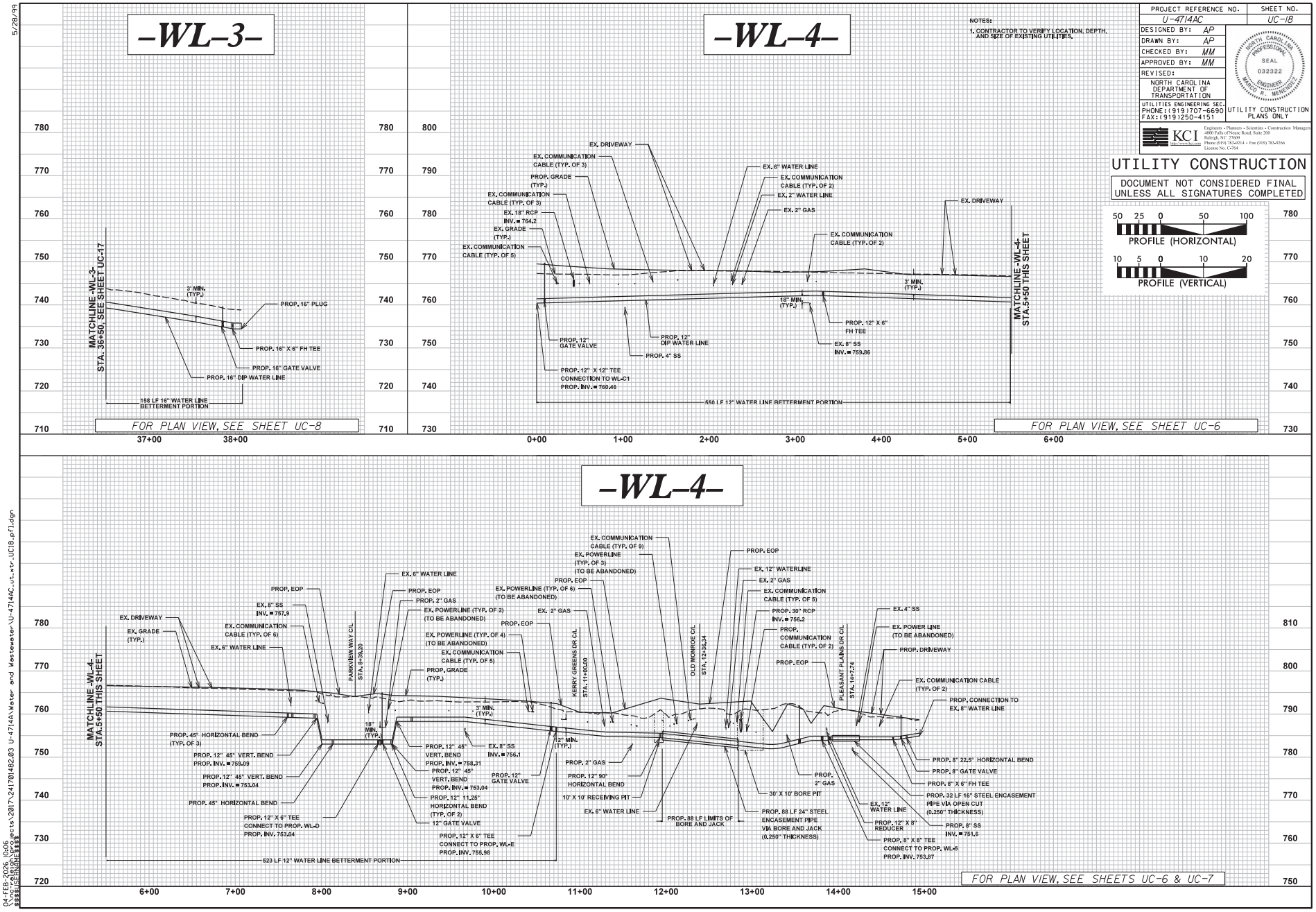
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PROFILE (VERTICAL)

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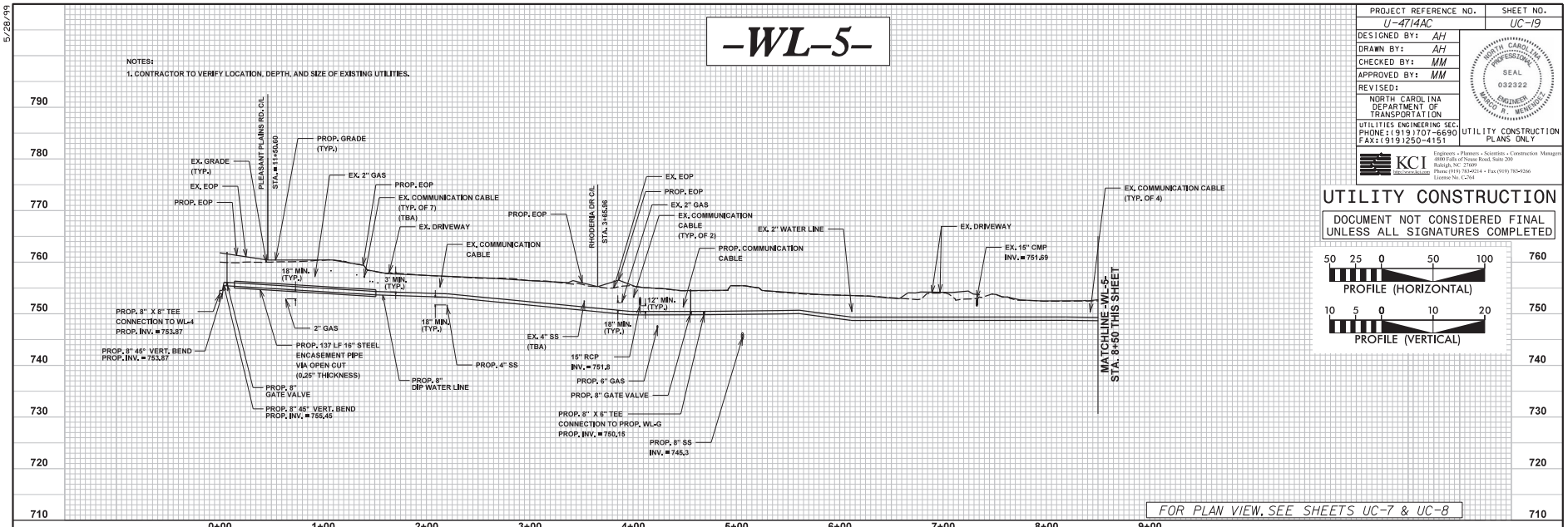

-WL-2-
NOTES:
1. CONTRACTOR TO VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
MATCHLINE -WL-2-
STA. 12+50, SEE SHEET UC-15
PROP. EOP
EX. 4" SS SERVICE LINE
EX. COMMUNICATION CABLE (TYP. OF 2)
PROP. DRIVEWAY
EX. 6" SS (TBA)
PROP. EOP
15" RCP INV. = 779.47
EX. 2" GAS
EX. 4" SS SERVICE LINE
PROP. COMMUNICATION CABLE
EX. 2" GAS (TYP. OF 3)
PROP. 4" SS SERVICE LINE
EX. GRADE (TYP.)
PROP. GRADE (TYP.)
18" RCP INV. = 778.43
EX. 2" GAS
PROP. CONNECTION TO EX. 8" WATER LINE
3' MIN. (TYP.)
18" MIN. (TYP.)
12" MIN. (TYP.)
12" MIN. (TYP.)
EX. COMMUNICATION CABLE (TYP. OF 3)
18" MIN. (TYP.)
3' MIN. (TYP.)
PROP. 12" 45° HORIZONTAL BEND
PROP. 12" 11.25° HORIZONTAL BEND
PROP. 12" DIP WATER LINE
PROP. 2" FM
PROP. 12" 45° HORIZONTAL BEND
PROP. 12" X 12" TEE CONNECT TO PROP. WL-C1 PROP. INV. = 774.00
PROP. 12" 45° VERT. BEND PROP. INV. = 777.33
PROP. 8" DIP WATER LINE
PROP. 12" 45° VERT. BEND PROP. INV. = 774.33
PROP 12" X 8" REDUCER
267 LF RESTRAINED JOINT (STA. 12+50 TO STA. 15+17)
100 LF RESTRAINED JOINT (STA. 0+00 TO STA. 7+62)
587 LF 12" WATER LINE BETTERMENT PORTION
FOR PLAN VIEW, SEE SHEET UC-5 & 5A
820
810
800
790
780
770
760
750
740
730
13+00
14+00
15+00
16+00
17+00
18+00
19+00
-WL-3-
PROP. GRADE (TYP.)
EX. GRADE (TYP.)
EX. DRIVEWAY
EX. 15" CMP STORM PIPE
EX. INV. IN = 766.09
EX. INV. OUT = 765.94
(TO BE REMOVED)
EX. COMMUNICATION CABLE (TYP. OF 4)
EX. COMMUNICATION CABLE (TYP. OF 5)
EX. 2" GAS
PROP. 8" SS
EX. COMMUNICATION CABLE (TYP. OF 2)
EX. 2" GAS
30" STORM PIPE INV. = 761.41
EX. 18" RCP
EX. INV. = 759.77
(TO BE REMOVED)
PROP. 18" 45° HORIZONTAL BEND CONNECTION TO EX. 16" WATER LINE
3' MIN. (TYP.)
12" MIN. (TYP.)
18" MIN. (TYP.)
18" MIN. (TYP.)
2" GAS
PROP. 16" 45° HORIZONTAL BEND
PROP. 16" DIP WATER LINE
PROP. 16" 45° HORIZONTAL BEND
PROP. 16" 22.5° HORIZONTAL BEND
PROP. 16" 11.25° HORIZONTAL BEND
PROP. 16" X 6" FH TEE
PROP. 16" 45° HORIZONTAL BEND
PROP. 16" X 6" FH TEE
36" STORM PIPE INV. = 762.85
PROP. 4" SS SERVICE LINE
PROP. 16" 11.25° VERT. BEND PROP. INV. = 759.26
PROP. 16" 11.25° VERT. BEND PROP. INV. = 759.65
PROP. 16" GATE VALVE
PROP. 16" X 16" TEE CONNECT TO PROP. CWL-2 PROP. INV. = 760.46
PROP. 16" X 12" TEE CONNECT TO PROP. CWL-1 PROP. INV. = 760.46
12" MIN. (TYP.)
EX. 6" AC WATER LINE (TBA)
PROP. 16" 11.25° HORIZONTAL BEND
308 LF 16" WATER LINE BETTERMENT PORTION
MATCHLINE -WL-3-
STA. 12+50, SHEET UC-17
FOR PLAN VIEW, SEE SHEET UC-5 & UC-6
800
790
780
770
760
750
740
730
720
710
0+00
1+00
2+00
3+00
4+00
5+00
6+00
7+00
8+00
9+00
10+00
11+00
12+00
PROJECT REFERENCE NO.
U-4714AC
SHEET NO.
UC-16
DESIGNED BY: AP
DRAWN BY: AP
CHECKED BY: MM
APPROVED BY: MM
REVISED:
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
UTILITIES ENGINEERING SEC.
PHONE: (919)707-6690
FAX: (919)250-4151
NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO H. MENENDEZ
UTILITY CONSTRUCTION PLANS ONLY
KCI
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4800 Falls of Neuse Road, Suite 200
Raleigh, NC 27609
Phone (919) 783-9214 • Fax (919) 783-9266
License No. C-294
UTILITY CONSTRUCTION
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PROFILE (VERTICAL)
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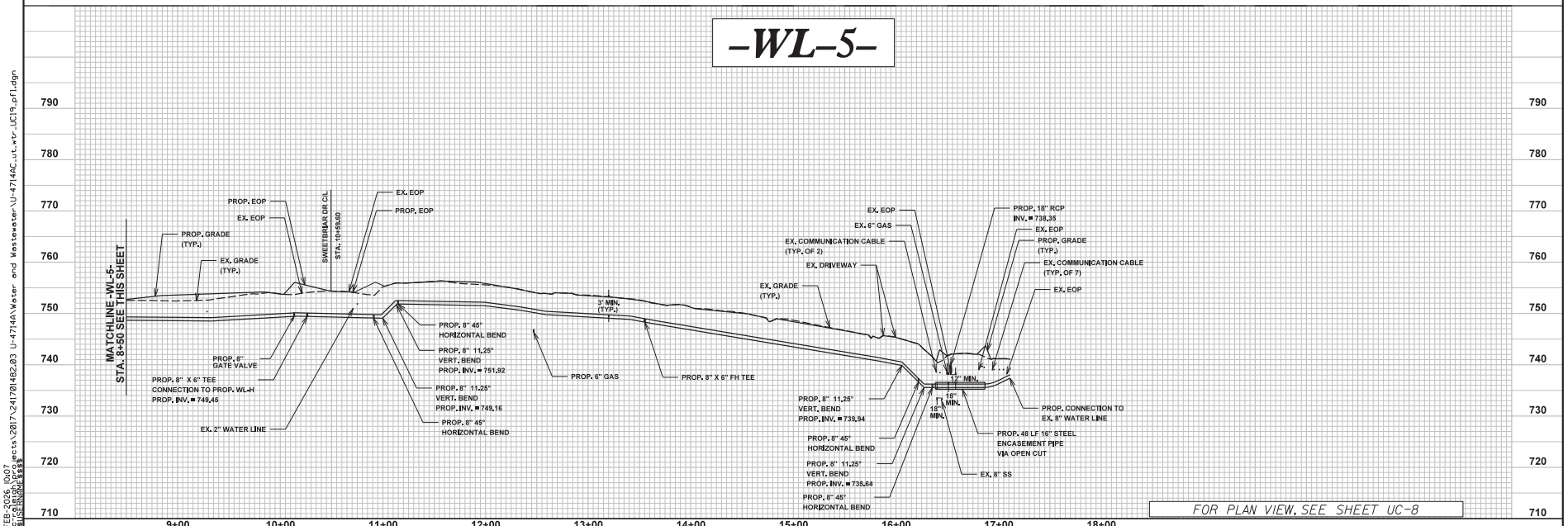

-WL-3-
NOTES:
1. CONTRACTOR TO VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.
MATCHLINE -WL-3- STA. 12+50, SEE SHEET UC-16
EX. COMMUNICATION CABLE (TYP. OF 2)
PROP. DRIVEWAY
EX. COMMUNICATION CABLE (TYP. OF 2)
PROP. DRIVEWAY
EX. 6" AC WATER LINE (TBA)
3' MIN. (TYP.)
EX. 8" PVC SS EX. INV. = 759.86
PROP. 16" DIP WATER LINE
PROP. 16" 22.5° HORIZONTAL BEND
PROP. EOP
EX. EOP
EX. COMMUNICATION CABLE (TYP. OF 3)
PARKVIEW WAY CL STA. 17+60
EX. EOP
PROP. EOP
EX. 2" GAS
EX. COMMUNICATION CABLE (TYP. OF 6)
PROP. UG POWER
EX. UG POWER LINE
PROP. COMMUNICATION CABLE
EX. 6" AC WATER LINE (TBA)
2" GAS
PROP. 6" WATER LINE
18" MIN. (TYP.)
12" MIN. (TYP.)
12" MIN. (TYP.)
PROP. UG POWER
EX. UG POWER (TYP. OF 14)
KERRY GREENS DR CL STA. 20+64
EX. 8" PVC WATER LINE (TBA)
PROP. 16" 45° VERT. BEND PROP. INV. = 754.13
2" GAS
PROP. 16" 45° VERT. BEND PROP. INV. = 749.39
PROP. COMMUNICATION CABLE (TYP. OF 2)
PROP. UG POWER LINE
EX. GRADE (TYP.)
PROP. 16" 45° HORIZONTAL BEND
PROP. 16" 22.5° HORIZONTAL BEND
PROP. 16" 22.5° VERT. BEND PROP. INV. = 749.39
PROP. 16" 22.5° VERT. BEND PROP. INV. = 753.17
EX. COMMUNICATION CABLE (TYP. OF 4)
PROP. 16" GATE VALVE
3' MIN. (TYP.)
MATCHLINE -WL-3- STA. 24+00, SEE THIS SHEET
1,150 LF 16" WATER LINE BETTERMENT PORTION
FOR PLAN VIEW, SEE SHEET UC-6 & UC-7
780
770
760
750
740
730
720
710
13+00
14+00
15+00
16+00
17+00
18+00
19+00
20+00
21+00
22+00
23+00
24+00
-WL-3-
MATCHLINE -WL-3- STA. 24+00, SEE THIS SHEET
PROP. EOP
EX. EOP
EX. UG POWER (TYP. OF 2)
CATAWBA CIR CL STA. 25+12
EX. EOP
EX. 6" PVC SS (TBA)
PROP. EOP
PROP. 6" DIP WATER LINE
PROP. COMMUNICATION CABLE (TYP. OF 2)
PROP. 16" 11.25° HORIZONTAL BEND
PROP. 16" 22.5° VERT. BEND PROP. INV. = 753.24
PROP. 16" 11.25° HORIZONTAL BEND
EX. COMMUNICATION CABLE (TYP. OF 10)
PROP. 16" 22.5° VERT. BEND PROP. INV. = 741.08
10' X 10' RECEIVING PIT
12" MIN.
3' MIN. (TYP.)
12" MIN. (TYP.)
PROP. 88 LF LIMITS OF BORE AND JACK
PROP. 16" 11.25° HORIZONTAL BEND
30' X 10' BORE PIT
PROP. 88 LF 36" STEEL ENCASEMENT
30" STORM PIPE INV. = 744.91
EX. GRADE (TYP.)
12" MIN. (TYP.)
PROP. 16" DIP WATER LINE
PROP. GRADE (TYP.)
PROP. 16" 22.5° HORIZONTAL BEND
PROP. 16" 22.5° HORIZONTAL BEND
EX. DRIVEWAY
EX. COMMUNICATION CABLE
PROP. 16" 45° HORIZONTAL BEND
PROP. 16" 45° HORIZONTAL BEND
MATCHLINE -WL-3- STA. 36+60, SEE SHEET UC-18
1,250 LF 16" WATER LINE BETTERMENT PORTION
50 25 0 50 100
PROFILE (HORIZONTAL)
10 5 0 10 20
PROFILE (VERTICAL)
FOR PLAN VIEW, SEE SHEET UC-7 & UC-8
780
770
760
750
740
730
720
710
700
650
24+00
25+00
26+00
27+00
28+00
29+00
30+00
31+00
32+00
33+00
34+00
35+00
36+00
PROJECT REFERENCE NO.
U-4714AC
SHEET NO.
UC-17
DESIGNED BY: AP
DRAWN BY: AP
CHECKED BY: MM
APPROVED BY: MM
REVISED:
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
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PHONE: (919)707-6690
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NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO F. MENENDEZ
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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-19
DESIGNED BY: AH	
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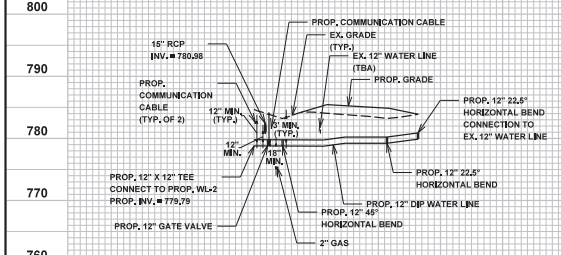
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PROFILE (VERTICAL)

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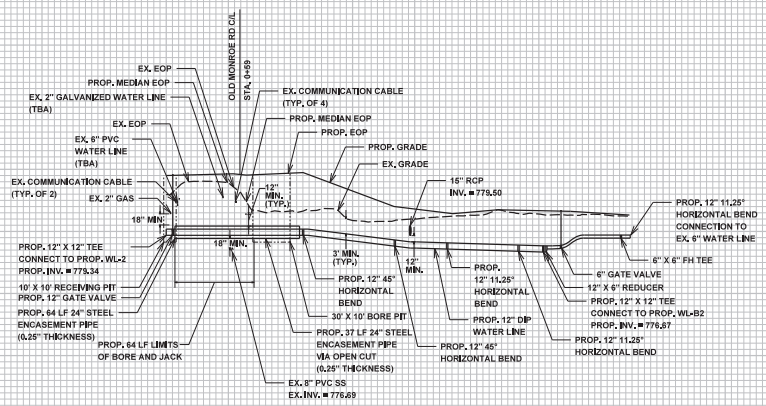
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-WL-A-



FOR PLAN VIEW, SEE SHEET UC-5

-WL-B1-



NOTES:
1. CONTRACTOR TO VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.

FOR PLAN VIEW, SEE SHEET UC-5

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-20
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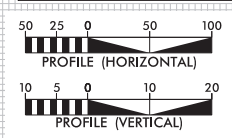
NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO R. MENENDEZ

UTILITY CONSTRUCTION PLANS ONLY

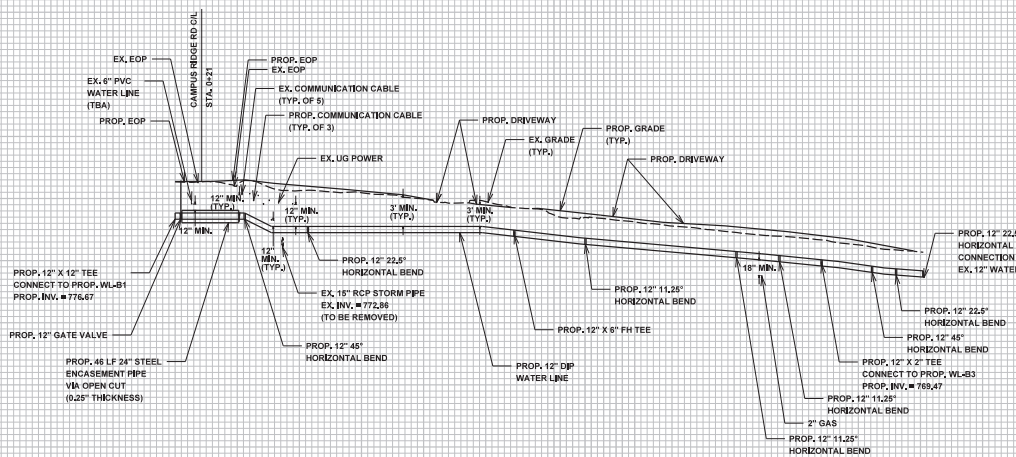
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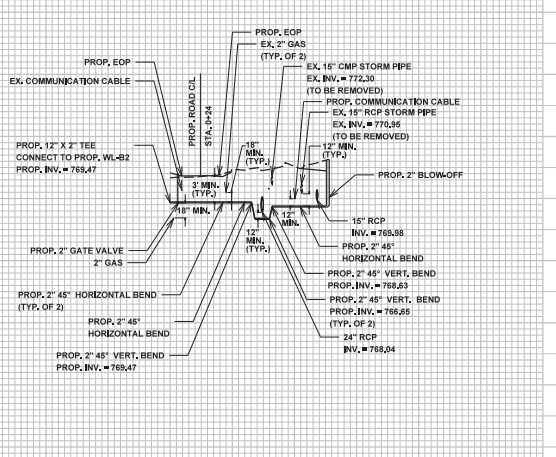


-WL-B2-



FOR PLAN VIEW, SEE SHEET UC-5

-WL-B3-

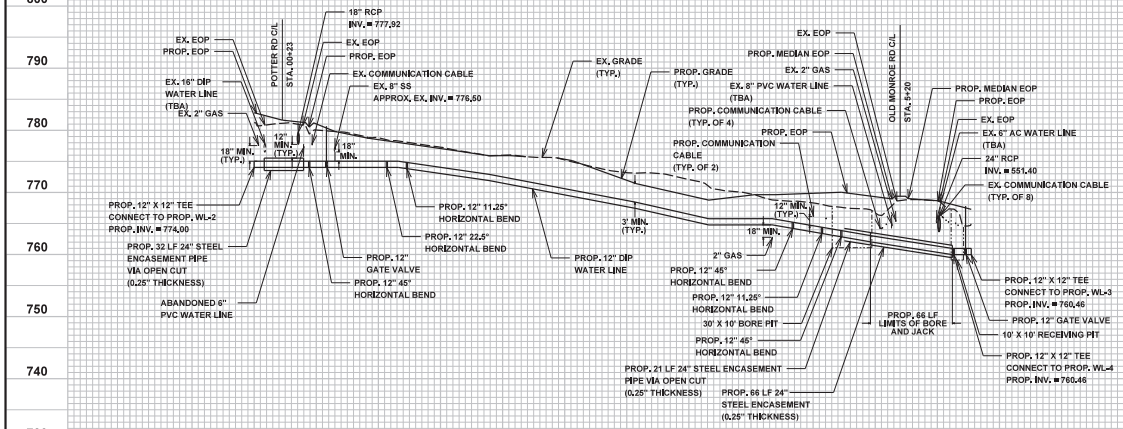


FOR PLAN VIEW, SEE SHEET UC-5

5/28/99

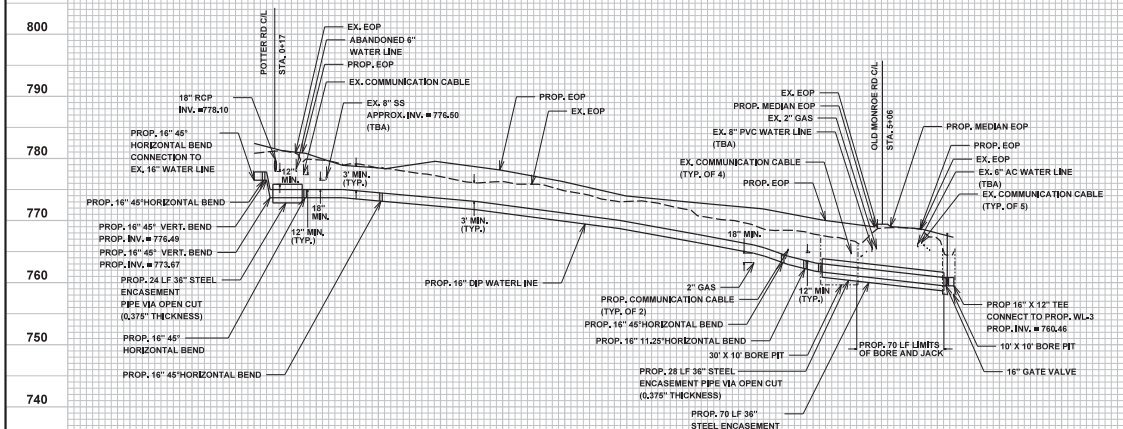
NOTES:
1. CONTRACTOR TO VERIFY LOCATION, DEPTH, AND SIZE OF EXISTING UTILITIES.

-WL-C1-



FOR PLAN VIEW, SEE SHEET UC-5A & 6

-WL-C2-



FOR PLAN VIEW, SEE SHEET UC-5A & 6

PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-2I
DESIGNED BY: AP	
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APPROVED BY: MM	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
UTILITIES ENGINEERING SEC.
PHONE: (919)707-6690
FAX: (919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO F. MENENDEZ

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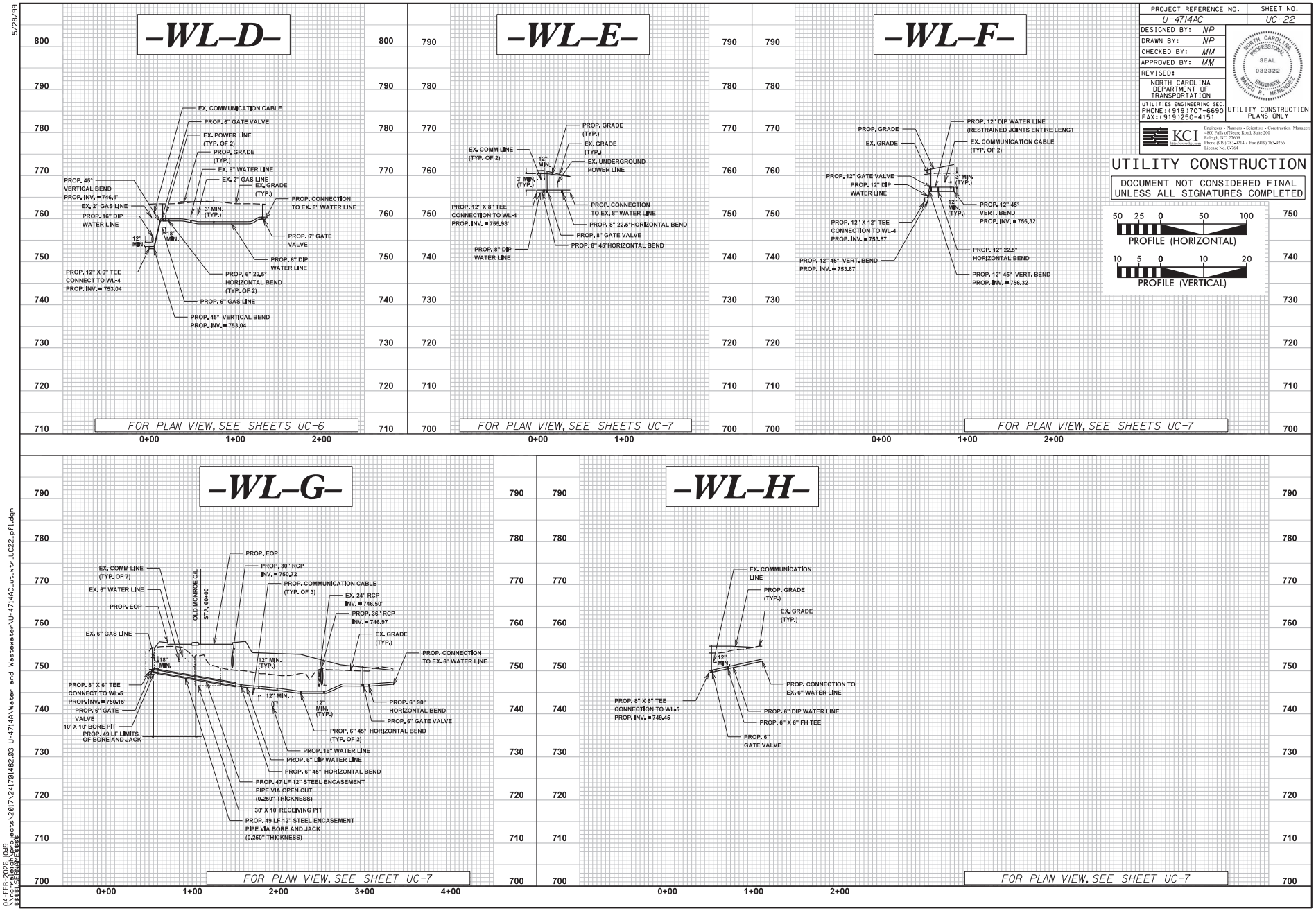
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PROJECT REFERENCE NO.	SHEET NO.
U-4714AC	UC-22
DESIGNED BY: NP	
DRAWN BY: NP	
CHECKED BY: MM	
APPROVED BY: MM	
REVISED:	

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UTILITIES ENGINEERING SEC.
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FAX: (919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 032322 ENGINEER MARCO A. MENENDEZ

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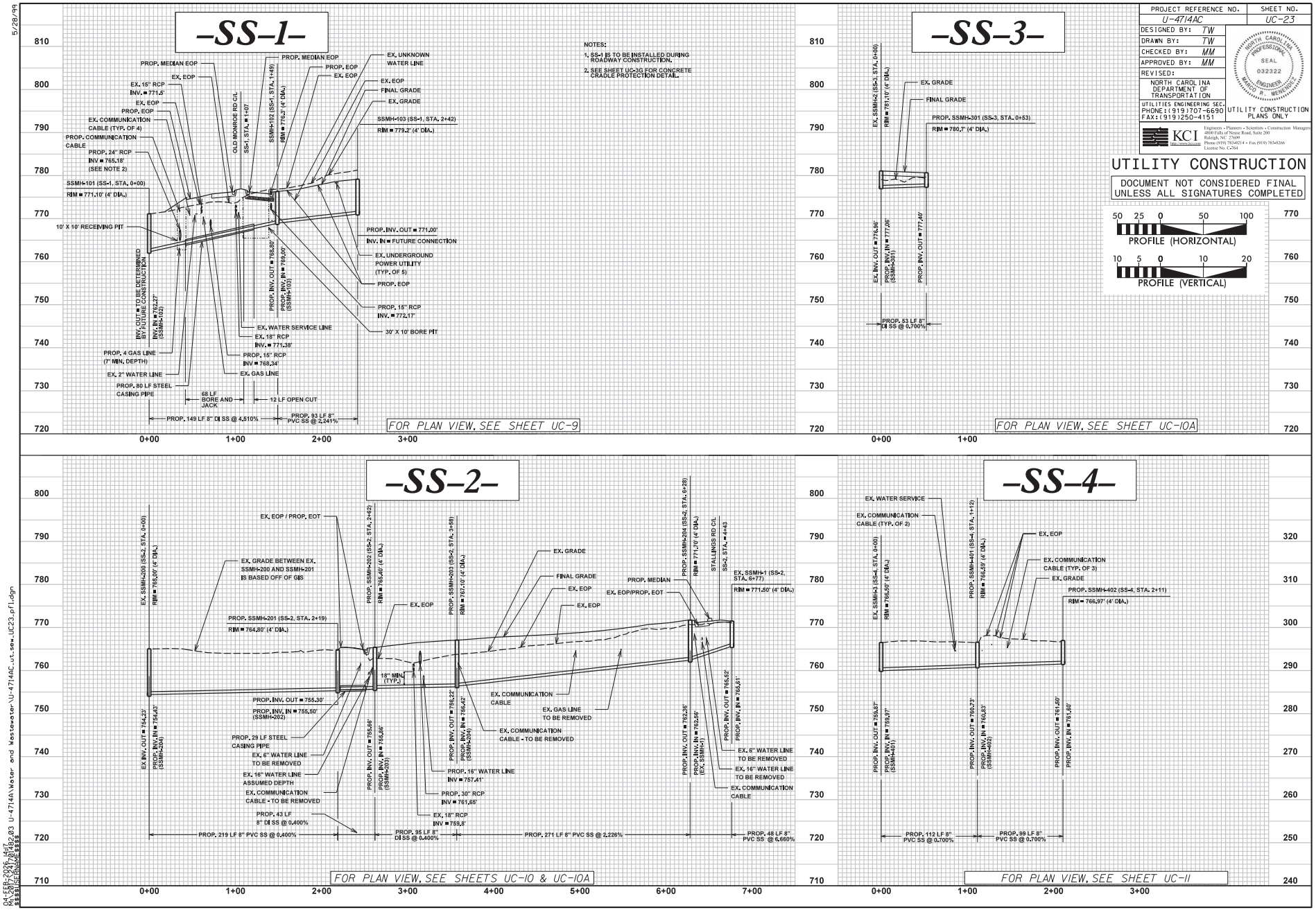
UTILITY CONSTRUCTION

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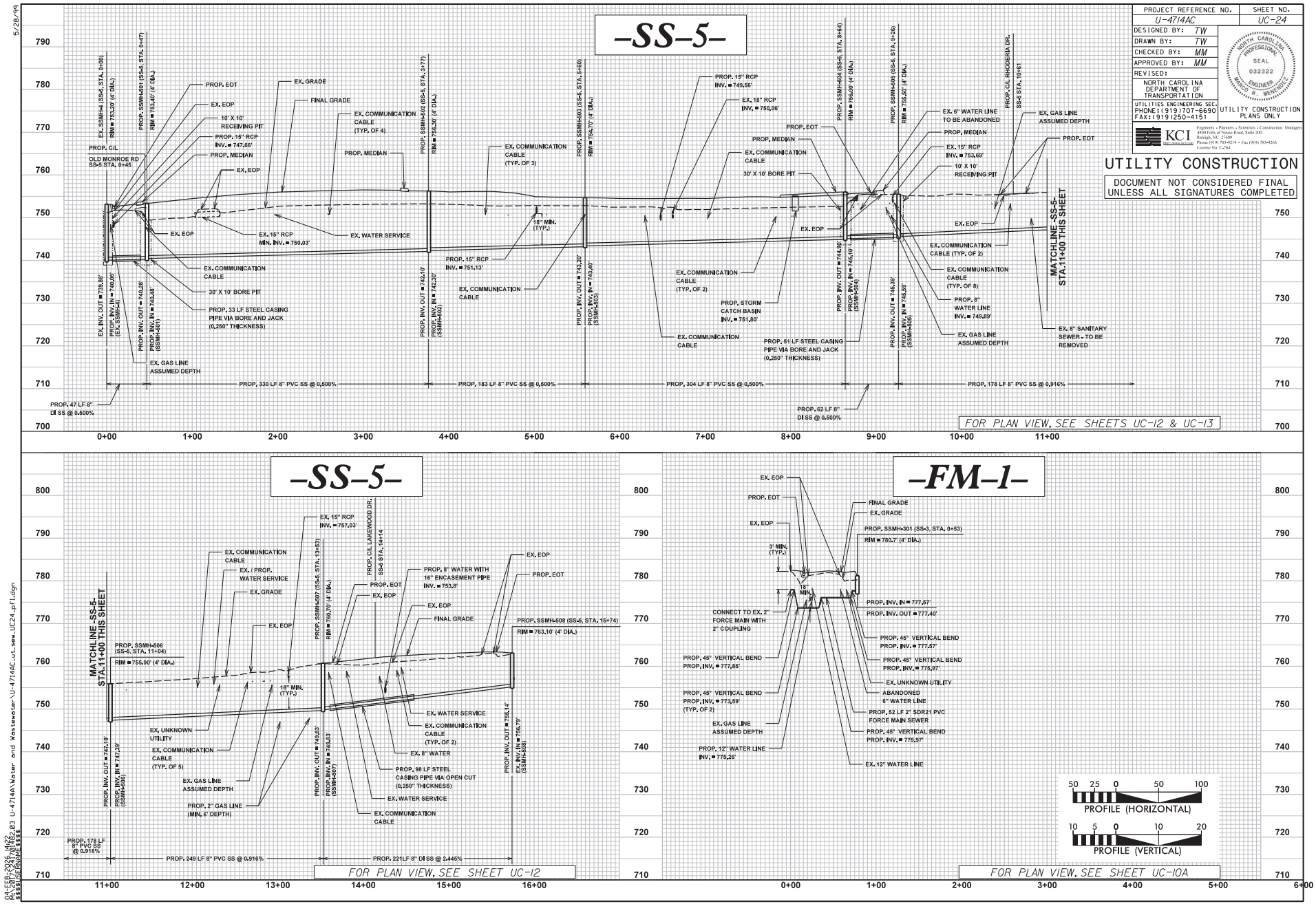
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EXHIBIT B

UC AGREEMENT
COST ESTIMATION
FOR U-4714AC

Utility Owner: Union County - Betterment
County: Union
Route: SR 1009
Length:
Based on Utility Construction Plans- 02/06/2026(U-4714AC)
Prepared By: Seth Shearon
Checked By: Marco Menendez
Date: 2/9/2026

					Betterment	Union County
Line Item	**Item No.**	**Pay Item**	**Quantity**	**Unit**	**Union County**	**Cost Responsibility**
1	0318000000-E	Foundation Conditioning Material, Minor Structures	783	TONS		17%
2	0321000000-E	Foundation Conditioning Geotextile	3,759	SY		58%
3	5691300000-E	8" Sanitary Gravity Sewer	1,228	LF		100%
4	5801000000-E	Abandon 8" Utility Pipe	91	LF		100%
5	5775000000-E	4' Dia Utility Manhole	7	EA		100%
6	5781000000-E	Utility Manhole Wall 4' Dia.	26	LF		100%
7	5326600000-E	16" Water Line	2,881	LF		43%
8	5326200000-E	12" Water Line	3,281	LF		6%
9	5540000000-E	6" Valve	1	EA		100%
10	5558000000-E	12" Valve	8	EA		59%
11	5558600000-E	16" Valve	2	EA		78%
12	5666000000-N	Fire Hydrant	1	EA		100%
13	5673000000-E	Fire Hydrant Leg	9	LF		100%
14	5329000000-E	Pounds of Ductile Iron Water Pipe Fittings	18,065	LBS		80%
15	5835700000-E	16" Encasement Pipe	84	LF		100%
16	5836000000-E	24" Encasement Pipe	126	LF		29%
17	5836400000-E	36" Encasement Pipe	88	LF		53%
18	5872500000-E	Bore and Jack of 16"	84	LF		100%
19	5872500000-E	Bore and Jack of 24"	66	LF		55%
20	5872500000-E	Bore and Jack of 36"	88	LF		33%
		Opinion of Probable Construction Cost $			$ 1,294,307.81	

Docusign Envelope ID: BC601FB7-1AEE-4007-BE26-94878A8EFE47

PROJECT SPECIAL PROVISIONS
Utility Construction
Union County

KCI ASSOCIATES OF NC, P.A.
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4800 Falls of Neuse Rd., Suite 200 • Raleigh, NC 27609 • Phone 919-783-9214

EXHIBIT C

SPECIAL PROVISIONS FOR U-4714AC

NORTH CAROLINA PROFESSIONAL SEAL
DocuSigned by:
Marco Menendez
D537A3E7672749A...
MARCO R. MENENDEZ
2/18/2026

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GENERAL CONSTRUCTION REQUIREMENTS:

Specifications:

The proposed water and sewer line construction shall meet the applicable requirements of the NC Department of Transportation "Standard Specifications for Roads and Structures" dated January 2024 (which includes measurement and payment); Union County's "Sanitary Sewer and Water Specifications" revision #8 dated 5/13/25 and "Standard Details" dated 9/13/24, the notes and details provided in the construction plans and the provisions outlined below.

Measurement and payment for proposed Utility Construction shall conform to the applicable requirements of the 2024 NCDOT Standard Specifications for Roads and Structures and as modified by these Special Provisions. If a discrepancy arises between the NCDOT Standard Specifications and Union County's Sanitary Sewer and Water Specifications that is not related to measurement and payment, the more stringent requirement shall prevail.

Owner:

The existing water and sewer lines and service lines within Union County are owned by Union County and operated and maintained by Union County Water. The primary contact person for the owner is Mr. Thomas Mann, PE; office phone is 704-292-2560; cell phone is 803-622-8169.

1500-2 Cooperation with the Utility Owner:

Page 15-1, Article 1500-2 Cooperation with the Utility Owner, lines 23 and 24, delete all of lines 23 and 24 and replace with the following paragraphs:

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Notify the utility owner at least 96 hours in advance of all arrangements for temporary service and for agreement with the utility owner as to the time that the service may be interrupted.

Testing, inspection, and acceptance of water and sewer utility shall be in accordance with NCDEQ and Union County requirements. Contractor shall coordinate with Union County to ensure all testing, inspection, and documentation requirements are met

Union County will notify water customers of planned service interruptions associated with work on the water and sewer lines. The contractor is responsible for notifying individual customers for service interruptions pertaining to service transfers and service repairs. Service transfers shall be performed during periods of convenience for individual water and sewer customers.

After testing is approved, Contractor to coordinate with Union County field representative to determine and plan working transfers of water service from existing water lines to the new water lines with a minimum of service interruption for water customers.

Utility Locations and Contractor Responsibility:

Contractor is to notify NCDOT and Union County field representatives of any discrepancies between the plans and field conditions prior to proceeding with work.

Placing Pipelines into Service:

Coordinate with Union County field representative to develop a plan to connect the new water lines to existing water lines while minimizing water service interruptions

For connections to existing water lines requiring a shutdown of the water system, contractor is to coordinate with Union County field representative. Provide a minimum of 96 hours of notice to field representative prior to the need for isolation of water lines to allow Union County time to notify Union County Operations staff, Union County Customer Care, emergency personnel, and customers of the planned service outage.

Materials:

Water line pipe of 6” and 8” diameter shall be Pressure Class 350 ductile iron pipe or PVC C900 pipe. 12” water line pipe shall be Pressure Class 350 ductile iron pipe. 16” water line pipe shall be Pressure Class 250 ductile iron pipe. Follow Union County specifications and NCDOT Section 1036. In addition to allowable restraining systems for restrained-joint ductile iron pipe as provided in the Union County specifications, field-locking gaskets are allowable as a restraining device.

All 2” water line pipe shall be PVC 1120 SDR 21 in accordance with ASTM-D2241. Fittings for 2” PVC pipe shall be push-on joint PVC or threaded malleable iron.

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All water service line ¾" thru 2" shall be Type "K" copper tubing with compression fittings. Splicing of copper service line of runs less than 100 feet will not be allowed. Provide and install a continuous segment of copper water service line between the corporation stop and water meter.

Gravity sewer pipe shall be SDR 26 PVC pipe or Pressure Class 350 ductile iron pipe. Pressure Class 350 ductile iron pipe shall be furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104.

All sewer lateral pipe shall be smooth-walled Schedule 40 PVC pipe in accordance with ASTMD1784, or Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104.

Provide and use #12 or #14 AWG stranded-copper wire with blue insulation for the utility locator wires on water pipe. Provide and use #12 or #14 AWG stranded-copper wire with green insulation for the utility locator wires on sewer pipe.

Ductile iron sewer fittings shall have a ceramic epoxy lining, Tnemec 431 or equal, and seal coated in accordance with ANSI/AWWA A21.4/C104. Ductile iron water pipe and fittings shall meet the requirements of Section 1036-5 (Ductile Iron Pipe and Fittings) of the NCDOT Standard Specifications for Roads and Structures, January 2024.

Valves, fire hydrants, corporation stops, saddles, and materials associated with water services shall meet the requirements for brand and model number as provided in the Union County Water "Sanitary Sewer and Water Specifications" revision #8 dated 5/13/25 and "Standard Details" dated 9/13/24. Water and sewer pipe for utility lines to be made in USA.

2" blow offs include MJ plug to match the diameter of the water pipe as required, 2" brass nipple, 2" brass pipe, 2" 90-degree bend, 2" coupling, 2" gate valve when required, valve box, concrete ring, and thrust blocking or restraint as required.

Elevations of fire hydrants above finished grade to be within manufacturer's recommendation. Elevations of fire hydrants to be determined by Contractor. No separate payment will be made for fire hydrant extensions. The cost of fire hydrant extensions is to be included in the unit price for fire hydrants.

Provide and install materials for temporary connection between the existing and proposed water mains for testing as called for in the plans. Apparatus for chlorine injection for testing should be installed along the temporary connection whenever possible. Such materials and associated work for testing will be incidental to water line installation. No separate payment will be made for installation and removal of temporary connections.

Testing and Sterilization:

Water for filling and testing water lines will be provided by Union County. Tests shall be repeated until test results are satisfactory.

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Samples for bacteriological testing will be collected by Union County personnel and tested at a laboratory under contract by Union County. Samples will typically be collected only on Wednesday mornings. Requests for sample collection must be made at least 48 hours in advance of the sample collection. Sample results will be available no sooner than 24 hours after the samples are delivered to the lab. There will be no cost to Contractor for sample testing for the first sample collected for each water line segment to be tested. Re-testing for failing bacteriological tests will be $50 per sample, payable to the testing laboratory, to be paid by contractor upon sample collection. Price is subject to change.

Twelve Month Guarantee:

(A) The Contractor shall guarantee materials and workmanship against latent and patent defects arising from faulty materials, faulty workmanship or negligence for a period of twelve months following the date of final acceptance of the work for maintenance and shall replace such defective materials and workmanship without cost to the Department or Union County. The Contractor will not be responsible for damage due to faulty design, normal wear and tear, for negligence on the part of the Department or Union County, and/or for use in excess of the design.

(B) Where items of equipment or material carry a manufacturer's guarantee for any period in excess of twelve months, then the manufacturer's guarantee shall apply for that particular piece of equipment or material. Union County's first remedy shall be through the manufacturer although the Contractor is responsible for invoking the warranted repair work with the manufacturer. The Contractor's responsibility shall be limited to the term of the manufacturer's guarantee. Union County would be afforded the same warranty as provided by the Manufacturer.

This guarantee provision shall be invoked only for major components of work in which the Contractor would be wholly responsible for under the terms of the contract. Examples would include water and sewer pipe, valves, blow off assemblies, fire hydrants, and manholes. This provision will not be used as a mechanism to force the Contractor to return to the project to make repairs or perform additional work for which the Department or Union County would normally compensate the Contractor. In addition, routine maintenance activities (i.e. mowing grass, debris removal, ruts in earth shoulders,) are not parts of this guarantee.

Appropriate provisions of the payment and/or performance bonds shall cover this guarantee for the project.

Payment:

No direct payment will be made for utility construction work required by the preceding provisions, which are general requirements applying to utility construction, and all the requirements stated will be considered incidental work, paid at the contract unit prices of the various utility items included in this contract.

Docusign Envelope ID: BC601FB7-1AEE-4007-BE26-94878A8EFE47

Measurement and payment for work will be in accordance with the NCDOT Standard Specifications for Roads and Structures, January 2024, with the exception of the following:

SP-1 RELOCATE SEWER LATERAL CLEAN OUT TO NEW RIGHT-OF-WAY

Description:
Locate and remove existing sewer clean out and lateral pipe and install new clean out and lateral pipe.

Materials:

Refer to Division 10 and Union County Specifications.

Item	Section
Sanitary Sewer Pipe and Fittings	1034

Use any pipe specified under Section 1034 except where a particular type of pipe is specified in the plans or required by environmental regulations or Departmental or Union County policy. Verify the pipe is appropriate for the test pressure of the system and the external loading.

For sewer services and laterals, use Schedule 40 PVC pipe or Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104.

Construction Methods:
Locate existing sewer clean out at old roadway right-of-way line. Contact North Carolina 811 as needed to locate the existing sewer service line. Coordinate with sewer customer as needed to minimize disruption to service.

Apply Section 1505 for excavation, trenching, pipe laying and backfill to sanitary sewer installation. Perform all excavation to uncover existing clean out, wye, and sewer lateral. Saw-cut and remove wye and vertical clean out pipe. Remove existing lateral pipe between the existing clean out and proposed clean out at the right-of-way or easement line shown in the plans.

Install 4-inch minimum diameter sanitary sewer clean-out flush with finished grade on 4-inch and 6-inch service lines. Provide clean-outs at the right-of-way line and at changes in direction. Do not locate clean-outs within the roadway pavement or shoulders. Provide clean-outs no more than 50 feet apart when beyond the roadway shoulders. Provide and install Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104 when required due to proximity to other utilities.

Assemble pipe in accordance with the recommendations of the manufacturer. Connect pipe to the saw-cut end of the existing lateral pipe and extend new lateral pipe to the new clean out location. Extend new pipe at the same slope as the existing sewer lateral pipe on the “sewer side” of the saw-cut. Differences in the elevations between the new lateral pipe and the existing private sewer

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lateral pipe at the right-of-way should be made up in the vertical clean out pipe using combination wyes as needed. Connect the existing sewer lateral pipe at the right-of-way to the new clean out. Provide sleeves or couplings as needed.

Measurement and Payment:
Relocate Sewer Lateral Clean Out to New Right-of-Way will be paid as the actual number of sewer clean outs relocated to the new right-of-way line, complete in place.

Materials used for clean outs and extension of sewer service lines for which there is a pay item will be paid under the specific pay item, including Sanitary Sewer Clean-Out and Sewer Service Line. No extra payment will be made for work included in other pay items. No separate payment will be made for explorations, PVC fittings, adapters, couplings, or construction equipment.

Pay Item:	**Pay Unit**
Relocate Sewer Lateral Clean Out to New Right-of-Way	Each

SP-2 REMOVE INTERCEPTOR TANK AND RECONNECT SEWER SERVICE

Description:

Locate and remove existing concrete sewer interceptor tanks and connect associated existing sewer service lines to new sanitary sewers. Provide clean outs as required.

Materials:

Refer to Division 10 and Union County Specifications.

Item	**Section**
Sanitary Sewer Pipe and Fittings	1034

Use any pipe specified under Section 1034 except where a particular type of pipe is specified in the plans or required by environmental regulations or Departmental or Union County policy. Verify the pipe is appropriate for the test pressure of the system and the external loading.

For sewer services and laterals, use Schedule 40 PVC pipe or Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104.

Construction Methods:
Locate existing sewer interceptor tanks near old roadway right-of-way line. Contact North Carolina 811 as needed to locate the existing sewer service line and tank. Coordinate with sewer customer as needed to minimize disruption to service.

The new mainline sewer must be installed, tested, approved, and permitted prior to removal of interceptor tanks and connection of new sewer service lines to the new sewer. Testing of the new mainline sewer is to include the sewer, sewer lateral service pipe to the clean out, and the clean

Docusign Envelope ID: BC601FB7-1AEE-4007-BE26-94878A8EFE47

out. If the interceptor tank is in the way of the new lateral pipe or clean out, test as much lateral pipe as is available and install the clean out as part of the service reconnection.

Apply Section 1505 for excavation, trenching, pipe laying and backfill to sanitary sewer installation. Furnish all equipment and materials necessary to perform all work. Excavate as needed to uncover the existing interceptor tank, clean out, and sewer lateral at each end of the tank. Pump all contents from the tank and dispose of the contents in a legal manner. Saw-cut lateral pipes entering and exiting the tank. Remove the tank and dispose of it at an environmentally approved location. Backfill and compact the excavation to finished service pipe elevation. Connect the new service pipe to the existing service pipe at the rear of the tank location and extend new service pipe to the proposed sewer clean out location at the right-of-way or permanent utility easement as shown in the plans. Install a plug on the saw-cut service line downstream of the tank location to complete abandonment of the old sewer service. Backfill and compact over the new service pipe to finished grade in accordance with the project specifications. Connection to the clean out and connection to the new sewer line must be accomplished immediately as an extension of this work to complete the new sewer service. Restore work areas in accordance with the project specifications and requirements.

Install 4-inch minimum diameter sanitary sewer clean-out flush with finished grade on 4-inch and 6-inch service lines. Provide clean-outs at the right-of-way line and at changes in direction. Do not locate clean-outs within the roadway pavement or shoulders. Provide clean-outs no more than 50 feet apart when beyond the roadway shoulders. Provide and install Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104 when required due to proximity to other utilities.

Assemble pipe in accordance with the recommendations of the manufacturer. Differences in the elevations between the new lateral pipe and the existing private sewer lateral pipe at the right-of-way should be made up in the vertical clean out pipe using combination wyes as needed. Provide sleeves, bushings, or couplings as needed.

Measurement and Payment:

Remove Interceptor Tank and Reconnect Sewer Service will be paid as the actual number of interceptor tanks removed and services reconnected, complete in place.

Materials used for clean outs and extension of sewer service lines for which there is a pay item will be paid under the specific pay item, including Sanitary Sewer Clean-Out and Sewer Service Line. No extra payment will be made for work included in other pay items. No separate payment will be made for explorations, PVC fittings, adapters, couplings, or construction equipment.

Pay Item:	**Pay Unit**
Remove Interceptor Tank and Reconnect Sewer Service	Each

File #: 26-259 **Agenda Date:** 5/18/2026

TITLE:

Contract - NCDOT Project U-4714BA (SR 1009 Old Monroe Road) - Utility PE and Construction Agreement

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 North Carolina Department of Transportation (NCDOT) 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 (UCW) Capital Improvement Program (CIP) includes an allocation for the design and construction of water line and sewer line betterments related to NCDOT's multi-phase project for the widening of Old Monroe Road. This agreement with NCDOT is for the phase of the Old Monroe Road widening project from Morningside Meadows Lane to South Fork Road. The water line betterments will increase the existing 6-inch water line to an 8-inch water line and will install a new 16-inch water transmission main to provide sufficient fire flow and pressure to meet future demand. The sewer line betterments will replace the existing 4-inch and 6-inch septic tank effluent gravity (STEG) wastewater collection system with standard 8-inch gravity sewer lines.

The water and sewer betterments will be administered by NCDOT as part of the Old Monroe Road widening project. UCW will be responsible for reimbursing NCDOT for the betterment costs in a not to exceed amount of $3,221,261.68.

FINANCIAL IMPACT:

Funding is available within the adopted account 60185527 - 853 West Zone Transmission Main Phase 4 to support the contract amount of $3,221,261.68.

AGREEMENT OVERVIEW

NORTH CAROLINA
UNION COUNTY

DATE: 3/18/2026

PARTIES TO THE AGREEMENT:

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

AND

UNION COUNTY

PROJECT NUMBERS:

TIP #: U-4714BA

WBS ELEMENTS: PE 39078.1.9
CON 39078.3.10

The purpose of this Agreement is to identify the participation in project costs, project delivery and/or maintenance, by the other party to this Agreement, as further defined in this Agreement.

SCOPE OF PROJECT ("Project"): This Project consists of water line relocation and betterments related to widening SR 1009 (John Street / Old Monroe Road) to multi-lanes from west of Morningside Meadow Lane to Indian Trail Road.

ESTIMATED COST TO OTHER PARTY: $ 3,221,261.68
ESTIMATED COST TO OTHER PARTY (PE): $ 8,261.68
ESTIMATED COSTS TO OTHER PARTY (CON): $ 3,213,000.00

PAYMENT TERMS: Union County will submit payment upon execution of agreement.

MAINTENANCE: Union County is responsible for all utility maintenance.

EFFECTIVE DATES OF AGREEMENT:
START: Upon Full Execution of this Agreement
END: When work is complete and all terms are met.

This **Agreement** is made and entered into on the last date executed below, by and between the North Carolina Department of Transportation, an agency of the State of North Carolina, hereinafter referred to as the **Department** and the Union County, hereinafter referred to as the **County**; and collectively referred to as the **Parties**.

The **Parties** to this Agreement, listed above, intend that this Agreement, together with all attachments, schedules, exhibits, and other documents that both are referenced in this Agreement and refer to this Agreement, represents the entire understanding between the **Parties** with respect to its subject matter and supersedes any previous communication or agreements that may exist.

I. WHEREAS STATEMENTS

WHEREAS, this Agreement is made under the authority granted to the **Department** by the North Carolina General Assembly under General Statutes of North Carolina (NCGS), particularly Chapter 136-27.1 and 136-27.3; and,

WHEREAS, the **Department** has plans to make certain street and highway constructions and/or traffic control improvements; and,

WHEREAS, the **County** has requested that the **Department** perform work or provide services; and,

WHEREAS, the **Parties** hereto wish to enter into an agreement for scoped work to be performed or provided by the **Department** (including construction, reviews, goods, or services) with reimbursement for the costs thereof by the **County** as hereinafter set out; and,

WHEREAS, the **Department** and the **County** have agreed that the jurisdictional limits of the **Parties**, as of the date of entering the agreement for the above-mentioned project, are to be used in determining the duties, responsibilities, rights, and legal obligations of the **Parties** hereto for the purposes of this Agreement.

NOW, THEREFORE, this Agreement states the promises and undertakings of each party as herein provided, and the **Parties** do hereby covenant and agree, each with the other, as follows:

II. RESPONSIBILITIES

A. DEPARTMENT

The **Department** shall be responsible for all phases of project delivery to include utility relocation, and construction, and/or maintenance as shown in the **PROJECT DELIVERY REQUIREMENTS** Provision.

B. COUNTY

The **County** shall be responsible for maintenance as shown in the **PROJECT DELIVERY REQUIREMENTS** Provision and payment as shown in the **COSTS AND FUNDING** Provision.

III. PROJECT DELIVERY REQUIREMENTS

A. PRELIMINARY ENGINEERING

i. At the request of the **County**, the **Department** will provide design services for the required relocation and/or betterment of the **County's** utility lines as affected by Project U-4714BA. The work is described as follows: water line design.

ii. The **Department** will ensure the design of municipal utility relocation is performed by professional engineering services. If the **Department** revises highway plans, then the **County** reserves the right to re-engineer relocation plans.

iii. Upon the satisfactory completion of the utility construction plans covered under this Agreement, the **County** shall review and approve the plans, the associated estimated utility construction cost, and special provisions to be made part of the **Department's** roadway contract for highway construction. The **County** shall release the **Department** of any future responsibility for the design of the utility construction plans. Said releases shall be deemed to be given by the **County** upon completion of the plans, estimate, special provisions and acceptance by the **Department** and **County** for the plans to be made part of the highway contract.

B. CONSTRUCTION

i. At the request of the **County** the **Department** shall place provisions in the construction contract for Project U-4714BA, for the contractor to adjust and relocate utility lines and/or provide betterment. The work is described as follows: water line relocation.

ii. Said work shall be accomplished in accordance with plan sheets, attached hereto as Exhibit "A", cost estimate attached hereto as Exhibit "B", and project specific provisions, if applicable, attached hereto as Exhibit "C".

iii. The Department's Standard Special Provisions binds the contractor to guarantee materials and workmanship against latent and patent defects arising from faulty materials, faulty workmanship or negligence for a period of twelve months following the date of final acceptance of the work for maintenance and shall replace such defective materials and workmanship without cost to the **Department**. The highway contractor will not be responsible for damage due to faulty design, normal wear and tear, for negligence on the part of the **Department**, and/or for use in excess of the design. Where items of material carry a manufacturer's guarantee for any period in excess of twelve months, then the manufacturer's guarantee shall apply to that particular piece of material. Appropriate provisions of the payment and/or performance bonds shall cover this guarantee for the project. Should any failure result from the conditions found in this section the **Department** would then enter into a Contract with the **County** for reimbursement to be made to the **County** for necessary repairs performed by the **County** and/or its contractor. The Utility Relocation Agreement would be issued by the NCDOT Utilities Unit and the repairs would be coordinated between the **County** and the Department's assigned Resident Engineer.

C. MAINTENANCE AND OPERATIONS

i. Upon satisfactory completion of the utility relocations and successful placement of the utility lines into service, the **County** shall assume responsibility for the normal maintenance and operation of the utility lines. Upon completion of the construction of the

highway project, the **County** shall release the **Department** from any and all claims for damages in connection with adjustments made to its utility lines; and, further, the **County** shall release the **Department** of any future responsibility for the cost of maintenance to said utility lines. The **Department** will invite the **County** to the Final Inspection meeting with its contractor and will include the **County** in the project acceptance notification. Said releases shall be deemed to be given by the **County** upon completion of construction of the project and its acceptance by the **Department** from its contractor unless the **County** notifies the **Department**, in writing, to the contrary prior to the **Department's** acceptance of the project.

ii. The **County** obligates itself to service and to maintain its facilities to be retained and installed over and along the highway within the **Department's** right-of-way limits in accordance with Paragraph B. i., the mandate of the North Carolina General Statutes and such other laws, rules, and regulations as have been or may be validly enacted or adopted, now or hereafter.

iii. If at any time the **Department** shall require the removal of or changes in the location of the encroaching facilities which are being relocated at the **County's** expense, the **County** binds itself, its successors and assigns, to promptly remove or alter said facilities, in order to conform to the said requirement (if applicable per G.S. 136-27.1), without any cost to the **Department**.

IV. COSTS AND FUNDING

A. PROJECT COSTS

i. The **County** shall be responsible for relocation, and/or betterment, costs for utility work as shown on the attached Exhibit "A". The estimated cost to the **County** is $3,221,261.68 as shown on the attached Exhibit "B".

ii. Upon request by the **County**, the **Department** will provide the **County** with an updated estimate of the utility work based on the bid amounts in the awarded highway contract.

iii. It is understood by both **Parties** that this is an estimated cost for the utility work described in this Agreement and is subject to change.

iv. If the **County** does not approve the anticipated cost increases, the **Department** will cease work on the Project. Any funding provided by the **County** that is unused will be returned to the **County**.

v. A supplemental agreement will be generated to document increased cost participation by the **County**. The **County** shall not unreasonably withhold consent to amending this agreement to account for documented cost increases.

B. PAYMENT BY THE COUNTY

i. Upon completion of the plans, the **Department** shall submit an itemized invoice to the **County** for costs incurred. Billing will be based upon the negotiated cost and any supplemental agreements made part of this agreement. Reimbursement shall be made by the **County** in one final payment within sixty (60) days of said invoice.

ii. Upon the satisfactory completion and the **County's** acceptance of the relocations and adjustments of the utility lines covered under this Agreement, the **Department** may at its discretion submit an itemized invoice to the **County** for partial costs incurred for the utility work. The partial cost invoice will not exceed 90% of the total utility work cost estimate. Upon completion of the highway work, the **Department** shall submit an itemized invoice to the **County** for the balance of unpaid costs incurred for the utility work. Billings will be based upon the actual bid prices and the actual quantities used.

iii. Reimbursement payments shall be made in full by the **County** within sixty (60) days of said invoices.

iv. If the **County** does not pay said invoices within sixty (60) days of the date of the invoice, the **Department** shall charge interest on any unpaid balance at a variable rate of the prime plus one percent (1%) in accordance with G.S. 136-27.3.

v. Any cost incurred due to additional utility work requested by the **County** after award of the construction contract, shall be solely the responsibility of the **County**. The **County** shall reimburse the **Department** 100% of the additional utility cost.

vi. In the event the **County** fails for any reason to pay the **Department** in accordance with the provisions for payment hereinabove provided, North Carolina General Statute 136-41.3 authorizes the **Department** to withhold so much of the **County's** share of funds allocated to said **County** by North Carolina General Statute, Section 136-41.1, until such time as the **Department** has received payment in full.

C. DOWN PAYMENT OR PRE-PAYMENT

At any time prior to final billing by the **Department**, the **County** may prepay any portion of the estimated cost by sending payment in accordance with the attached "Remittance Guidance". The **Department** will provide a final billing based on the fixed cost, less any previous payments that have been made.

V. STANDARD PROVISIONS

A. AGREEMENT MODIFICATIONS

Any modification to scope, funding, responsibilities, or time frame will be agreed upon by all **Parties** by means of a written supplemental agreement.

B. ASSIGNMENT OF RESPONSIBILITIES

The **Department** must approve any assignment or transfer of the responsibilities of the **County** set forth in this Agreement to other parties or entities.

C. AGREEMENT FOR IDENTIFIED PARTIES ONLY

This Agreement is solely for the benefit of the identified **Parties** to the Agreement and is not intended to give any rights, claims, or benefits to third parties or to the public at large.

D. OTHER AGREEMENTS

The **County** is solely responsible for all agreements, contracts, and work orders entered into or issued by the **County** to meet the terms of this Agreement. The **Department** is not responsible for any expenses or obligations incurred for the terms of this Agreement except those specifically eligible for the funds and obligations as approved by the **Department** under the terms of this Agreement.

E. TITLE VI

The other party to this Agreement shall comply with Title VI of the Civil Rights Act of 1964 (Title 49 CFR, Subtitle A, Part 21) and related nondiscrimination authorities. Title VI and related authorities prohibit discrimination on the basis of race, color, national origin, disability, gender, and age in all programs or activities of any recipient of Federal assistance.

F. AUTHORIZATION TO EXECUTE

The **Parties** hereby acknowledge that the individual executing this Agreement has read this Agreement, conferred with legal counsel, fully understands its contents, and is authorized to execute this Agreement and to bind the respective **Parties** to the terms contained herein.

G. DEBARMENT POLICY

It is the policy of the **Department** not to enter into any agreement with parties that have been debarred by any government agency (Federal or State). By execution of this agreement, the **County** certifies that neither it nor its agents or contractors are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any Federal or State Agency or Department and that it will not enter into agreements with any entity that is debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction.

H. INDEMNIFICATION

To the extent authorized by state and federal statutes, the **County** will indemnify and hold harmless the FHWA (if applicable), the **Department** and the State of North Carolina, their respective officers, directors, principals, employees, agents, successors, and assigns from and against any and all claims for damage and/or liability, including those that may be initiated by third parties, in connection with the Project activities performed pursuant to this Agreement including construction of the Project, except for those claims arising out of the errors, omissions, or negligence of the **Department**, its respective officers, directors, principals, employees, agents, successors, and assigns.

I. AVAILABILITY OF FUNDS

All terms and conditions of this Agreement are dependent upon, and, subject to the allocation of funds for the purpose set forth in the Agreement and the Agreement shall automatically terminate if funds cease to be available.

J. COUNTERPARTS AND ELECTRONIC SIGNATURES

i. This Agreement, and other documents to be delivered pursuant to this Agreement, may be executed in one or more counterparts, each of which will be deemed to be an original copy and all of which, when taken together, will be deemed to constitute one and the same agreement or document and will be effective when counterparts have been signed by each of the **Parties**. An image of a manual signature on this Agreement, or other documents to be delivered pursuant to this Agreement, will constitute an original signature for all purposes. The delivery of copies of this Agreement or other documents to be delivered pursuant to this Agreement, including executed signature pages where required, by electronic transmission will constitute effective delivery of this Agreement or such other document for all purposes.

ii. The **Parties** hereto further acknowledge and agree that this Agreement may be signed and/or transmitted by email or a PDF document or using electronic signature technology (e.g. DocuSign, Adobe Sign, or other electronic signature technology), and that such signed record shall be valid and as effective to bind the **Party(ies)** so signing as a paper copy bearing a handwritten signature. By selecting "I Agree", "I Accept", or other similar item, button, or icon via use of a keypad, mouse, or other device, as part of the electronic signature technology, the **Parties** consent to be legally bound by the terms and conditions of Agreement and that such act constitutes a signature as if actually signed in writing. The **Parties** also agree that no certification authority or other third-party verification is necessary to validate its electronic signature and that the lack of such certification or third-party verification will not in any way affect the enforceability of its electronic signature; however, each **Party** agrees to maintain certification records and will produce said records upon request. The **Parties** acknowledge and agree that delivery of a copy of this Agreement or any other document contemplated hereby through the electronic signature

technology, will have the same effect as physical delivery of the paper document bearing an original written signature.

K. GIFT BAN

By Executive Order 24, issued by Governor Perdue, and NCGS 133-32, it is unlawful for any vendor or contractor (i.e. architect, bidder, contractor, construction manager, design professional, engineer, landlord, offeror, seller, subcontractor, supplier, or vendor), to make gifts or to give favors to any State employee of the Governor's Cabinet Agencies (i.e. Administration, Adult Corrections, Commerce, Environmental Quality, Health and Human Services, Information Technology, Military and Veterans Affairs, Natural and Cultural Resources, Public Safety, Revenue, Transportation, and the Office of the Governor).

SIGNATURE PAGE

IN WITNESS WHEREOF, this Agreement has been executed the day and year heretofore set out, on the part of the **Department** and the **County** by authority duly given.

(DOCUSIGN ONLY)

UNION COUNTY

Authorized Signer: _____ Print Name: _____

Date Signed: _____ Title: _____

Approved as to Legal Form: BTI

If applicable, this Agreement has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act:

Finance Signer: _____ Print Name: _____

Date Signed: _____ Title: _____

Fed Tax ID No: _____

Remittance Address: _____

Purchase Order, Ref. No., etc.:

_____

Accounts Payable Contact:

Name: _____

Email: _____

Phone Number: _____

DEPARTMENT OF TRANSPORTATION

By: _____ Print Name: _____

Date: _____ Title: _____

APPROVED BY BOARD OF TRANSPORTATION ITEM O: _____ (DATE)

SIGNATURE PAGE

IN WITNESS WHEREOF, this Agreement has been executed the day and year heretofore set out, on the part of the **Department** and the **County** by authority duly given.

UNION COUNTY (INK SIGNATURES)

Attest:

By: _____

Title: _____

Authorized Signer: _____

Print Name: _____

Title: _____

Date Signed: _____

If applicable, this Agreement has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act:

Fed Tax ID No: _____

Remittance Address:

_____

_____

Finance Signer: _____

Print Name: _____

Title: _____

Date Signed: _____

Purchase Order, Ref. No., etc.:

_____

Accounts Payable Contact:

Name: _____

Email: _____

Phone Number: _____

DEPARTMENT OF TRANSPORTATION (DOCUSIGN)

By: _____

Date: _____

Print Name: _____

Title: _____

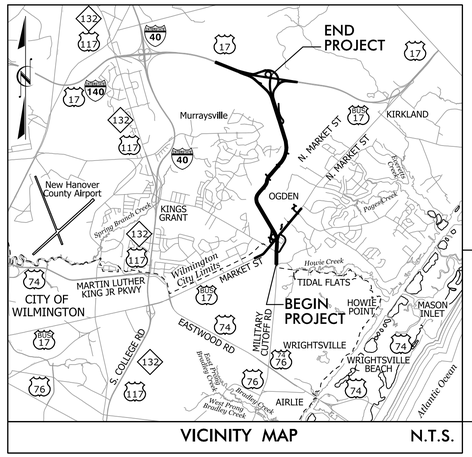
APPROVED BY BOARD OF TRANSPORTATION ITEM O: _____ (DATE)

T.I.P. NO.	SHEET NO.
U–4714BA	UC–1

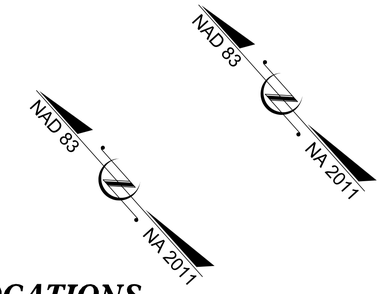
STATE OF NORTH CAROLINA
DIVISION OF HIGHWAYS

UTILITY CONSTRUCTION PLANS
UNION COUNTY

TIP PROJECT: U–4714BA



90% PLANS



LOCATION: SR 1009 (OLD MONROE ROAD) FROM WEST OF MORNINGSIDE MEADOW LANE TO EAST OF SR 1377 (WESLEY CHAPEL–STOUTS RD)

TYPE OF WORK: WATER LINE AND SANITARY SEWER RELOCATIONS

END TIP PROJECT U–4714AC
–L– POT STA. 193+50.61 LB=
BEGIN TIP PROJECT U–4714BA
–L– POT STA. 10+00.00 LA

END TIP PROJECT U–4714BA
BEGIN FUTURE TIP PROJECT U–4714BB
–L– POT STA. 85+85.86=
–LBA– POT STA. 17+74.95

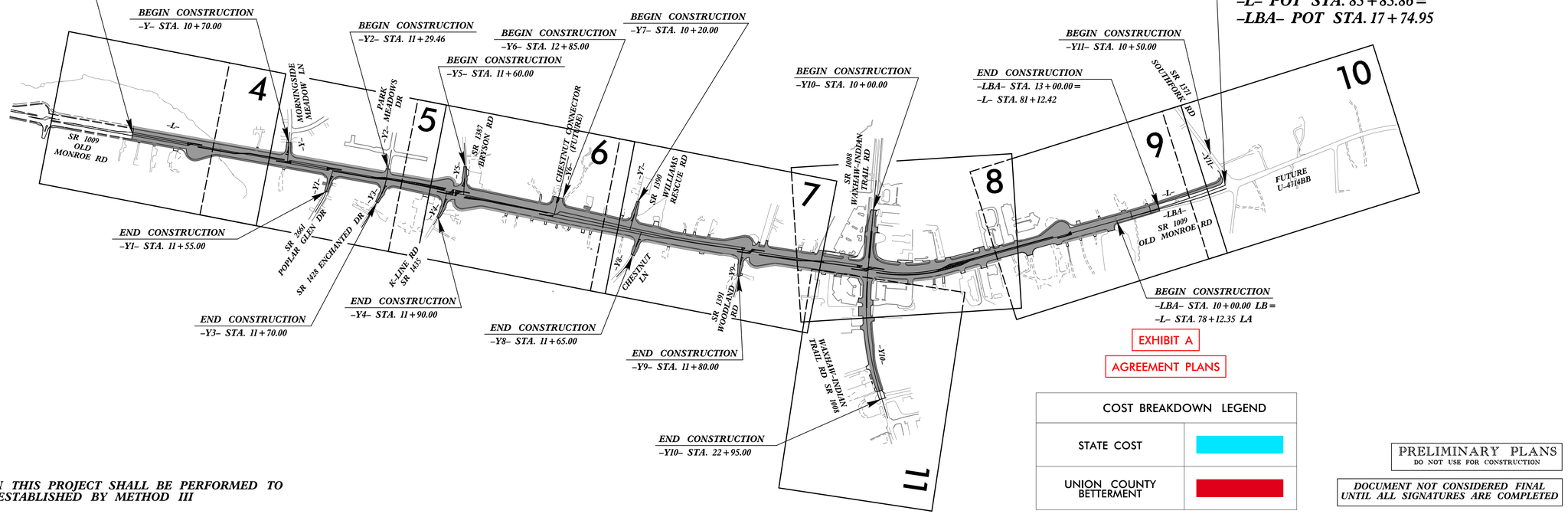


EXHIBIT A

AGREEMENT PLANS

COST BREAKDOWN LEGEND	
STATE COST	
UNION COUNTY BETTERMENT	

PRELIMINARY PLANS
DO NOT USE FOR CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNTIL ALL SIGNATURES ARE COMPLETED

CLEARING ON THIS PROJECT SHALL BE PERFORMED TO THE LIMITS ESTABLISHED BY METHOD III

GRAPHIC SCALES

50 25 0 50 100
PLANS

50 25 0 50 100
PROFILE (HORIZONTAL)

10 5 0 10 20
PROFILE (VERTICAL)

INDEX OF SHEETS

SHEET NO.:	*DESCRIPTION:*
UC–1	*TITLE SHEET*
UC–2	*UTILITY SYMBOLOGY*
UC–3 – UC–3A	*NOTES*
UC–3B – UC–3J	*DETAILS*
UC–4 – UC–10, UC–20	*UTILITY CONSTRUCTION SHEETS*
UC–22 – UC–28, UC–38	*ABANDONMENT & ADJUSTMENT SHEETS*
UC–40 – UC–44, UC–51 – UC–57,	*PROFILE SHEETS*
UC–62, UC–65 – UC–67	

WATER AND SEWER OWNERS ON PROJECT

(A) WATER – UNION COUNTY WATER
(B) SANITARY SEWER – UNION COUNTY WATER

PREPARED IN THE OFFICE OF

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09/08/99
11/21/2026
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KrantzRT

5/14/99

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-2

STATE OF NORTH CAROLINA
DIVISION OF HIGHWAYS

UTILITIES PLAN SHEET SYMBOLS

PROPOSED WATER SYMBOLS

- Water Line (Sized as Shown) — 12" WL
- 11¼ Degree Bend
- 22½ Degree Bend
- 45 Degree Bend
- 90 Degree Bend
- Plug
- Tee
- Cross
- Reducer
- Gate Valve — GV
- Butterfly Valve — BV
- Tapping Valve — TGV
- Line Stop — LS
- Line Stop with Bypass — LS/BP
- Blow Off — BO
- Fire Hydrant — PFH
- Relocate Fire Hydrant — RFH
- Remove Fire Hydrant — REM FH
- Water Meter — PWM
- Relocate Water Meter — RWM
- Remove Water Meter — REM WM
- Water Pump Station — PS(W)
- RPZ Backflow Preventer — PRPZ
- DCV Backflow Preventer — PBFP
- Relocate RPZ Backflow Preventer — RRPZ
- Relocate DCV Backflow Preventer — RBFP

PROPOSED SEWER SYMBOLS

- Gravity Sewer Line (Sized as Shown) — 12" SS
- Force Main Sewer Line (Sized as Shown) — 12" FSS
- Manhole (Sized per Note)
- Sewer Pump Station — PS(SS)

PROPOSED MISCELLANEOUS UTILITIES SYMBOLS

- Power Pole
- Telephone Pole
- Joint Use Pole
- Telephone Pedestal — TEL PED
- Utility Line by Others (Type as Shown) — PROP O/H POW LINES
- Trenchless Installation — 12" TL INSTALL
- Encasement by Open Cut — 24" ENCAS BY OC
- Encasement — 24" ENCASEMENT
- Thrust Block
- Air Release Valve — AR
- Utility Vault — UV
- Concrete Pier — CP
- Steel Pier — SP
- Plan Note — NOTE
- Pay Item Note — PAY ITEM

EXISTING UTILITIES SYMBOLS

- Power Pole
- Telephone Pole
- Joint Use Pole
- Utility Pole
- Utility Pole with Base
- H-Frame Pole
- Power Transmission Line Tower
- Water Manhole — W
- Power Manhole — P
- Telephone Manhole — T
- Sanitary Sewer Manhole — S
- Hand Hole for Cable — H
- Power Transformer — T
- Telephone Pedestal — T
- CATV Pedestal — C
- Gas Valve
- Gas Meter
- Located Miscellaneous Utility Object
- Abandoned According to Utility Records — AATUR
- End of Information — E.O.I.
- *Underground Power Line — P
- *Underground Telephone Cable — T
- *Underground Telephone Conduit — TC
- *Underground Fiber Optics Telephone Cable — T FO
- *Underground TV Cable — TV
- *Underground Fiber Optics TV Cable — TV FO
- *Underground Gas Pipeline — G
- Aboveground Gas Pipeline — A/G Gas
- *Underground Water Line — W
- Aboveground Water Line — A/G Water
- *Underground Gravity Sanitary Sewer Line — SS
- Aboveground Gravity Sanitary Sewer Line — A/G Sanitary Sewer
- *Underground SS Forced Main Line — FSS
- Underground Unknown Utility Line — ?UTL
- SUE Test Hole
- Water Meter
- Water Valve
- Fire Hydrant
- Sanitary Sewer Cleanout

*For Existing Utilities

- Utility Line Drawn from Record (Type as Shown)
- Designated Utility Line (Type as Shown)

REV: 2/1/2012

1/21/2026
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jmiller

UTILITY CONSTRUCTION

GENERAL NOTES:

1. THE PROPOSED UTILITY CONSTRUCTION SHALL MEET THE APPLICABLE REQUIREMENTS OF THE NC DEPARTMENT OF TRANSPORTATION'S "STANDARD SPECIFICATIONS FOR ROADS AND STRUCTURES" DATED JANUARY 2024.

2. THE EXISTING UTILITIES BELONG TO UNION COUNTY WATER .

3. ALL WATER LINES TO BE INSTALLED WITHIN COMPLIANCE OF THE RULES AND REGULATIONS OF THE NORTH CAROLINA DEPARTMENT OF ENVIRONMENTAL QUALITY, DIVISION OF WATER RESOURCES, PUBLIC WATER SUPPLY SECTION. ALL SEWER LINES TO BE INSTALLED WITHIN COMPLIANCE OF THE RULES AND REGULATIONS OF THE NORTH CAROLINA DEPARTMENT OF ENVIRONMENT QUALITY, DIVISION OF WATER RESOURCES, WATER QUALITY SECTION. PERFORM ALL WORK IN ACCORDANCE WITH THE APPLICABLE PLUMBING CODES.

4. THE UTILITY OWNER OWNS THE EXISTING UTILITY FACILITIES AND WILL OWN THE NEW UTILITY FACILITIES AFTER ACCEPTANCE BY THE DEPARTMENT. THE DEPARTMENT OWNS THE CONSTRUCTION CONTRACT AND HAS ADMINISTRATIVE AUTHORITY. COMMUNICATIONS AND DECISIONS BETWEEN THE CONTRACTOR AND UTILITY OWNER ARE NOT BINDING UPON THE DEPARTMENT OR THIS CONTRACT UNLESS AUTHORIZED BY THE ENGINEER. AGREEMENTS BETWEEN THE UTILITY OWNER AND CONTRACTOR FOR THE WORK THAT IS NOT PART OF THIS CONTRACT OR IS SECONDARY TO THIS CONTRACT ARE ALLOWED, BUT ARE NOT BINDING UPON THE DEPARTMENT.

5. PROVIDE ACCESS FOR THE DEPARTMENT PERSONNEL AND THE OWNER'S REPRESENTATIVES TO ALL PHASES OF CONSTRUCTION. NOTIFY DEPARTMENT PERSONNEL AND THE UTILITY OWNER TWO WEEKS PRIOR TO COMMENCEMENT OF ANY WORK AND ONE WEEK PRIOR TO SERVICE INTERRUPTION. KEEP UTILITY OWNERS' REPRESENTATIVES INFORMED OF WORK PROGRESS AND PROVIDE OPPORTUNITY FOR INSPECTION OF CONSTRUCTION AND TESTING.

6. MAKE FINAL CONNECTIONS OF THE NEW WORK TO THE EXISTING SYSTEM WHERE INDICATED ON THE PLANS, AS REQUIRED TO FIT THE ACTUAL CONDITIONS, OR AS DIRECTED.

7. THE PLANS DEPICT THE BEST AVAILABLE INFORMATION FOR THE LOCATION, SIZE, AND TYPE OF MATERIAL FOR ALL EXISTING UTILITIES. MAKE INVESTIGATIONS FOR DETERMINING THE EXACT LOCATION, SIZE, AND TYPE MATERIAL OF THE EXISTING FACILITIES AS NECESSARY FOR THE CONSTRUCTION OF THE PROPOSED UTILITIES AND FOR AVOIDING DAMAGE TO EXISTING FACILITIES. REPAIR ANY DAMAGE INCURRED TO EXISTING FACILITIES TO THE ORIGINAL OR BETTER CONDITION AT NO ADDITIONAL COST TO THE DEPARTMENT.

8. MAKE CONNECTIONS BETWEEN EXISTING AND PROPOSED UTILITIES AT TIMES MOST CONVENIENT TO THE PUBLIC, WITHOUT ENDANGERING THE UTILITY SERVICE, AND IN ACCORDANCE WITH THE UTILITY OWNER'S REQUIREMENTS. MAKE CONNECTIONS ON WEEKENDS, AT NIGHT, AND ON HOLIDAYS IF NECESSARY.

9. ALL UTILITY MATERIALS SHALL BE APPROVED PRIOR TO DELIVERY TO THE PROJECT. SEE 1500-7, " SUBMITTALS AND RECORDS" IN SECTION 1500 OF THE STANDARD SPECIFICATIONS.

PROJECT SPECIFIC NOTES:

1. ALL CONSTRUCTED AND PROPOSED WATER LINES TO BE TESTED PER UNION COUNTY WATER, NCDOT, AND NCDEQ STANDARD SPECIFICATIONS.

2. THE UTILITY OWNER OWNS THE EXISTING UTILITY FACILITIES AND WILL OWN THE NEW UTILITY FACILITIES AFTER ACCEPTANCE BY UNION COUNTY WATER REPRESENTATIVE.

3. IF THE PROPOSED WATER AND/OR SANITARY SEWER MAIN IS INSTALLED WITHIN 12" IN ANY DIRECTION (VERTICALLY OR HORIZONTALLY) OF A GAS MAIN THEN THE CONTRACTOR SHALL CALL PIEDMONT NATURAL GAS COMPANY AT (704) 525-5585 AND INFORM THEM.

4. THE CONTRACTOR SHALL USE EROSION CONTROL MEASURES, AS DIRECTED.

5. IF ADDITIONAL WORK SPACE IS NEEDED, AN ENCROACHMENT IS TO BE AGREED UPON BETWEEN THE CONTRACTOR AND THE PROPERTY OWNER.

6. CONCRETE THRUST BLOCKING, WALL BLOCKING, RODDING, OR OTHER APPROVED METHOD SHALL BE PROVIDED BY CONTRACTOR AS NEEDED ON EXISTING WATER LINES AT THE PROPOSED RELOCATION TIE-IN POINTS

7. THE LOCATION OF EXISTING UTILITIES SHOWN ON THE PLANS IS FOR THE USE OF THE CONTRACTOR IN PROVIDING PROTECTION FOR THE UTILITIES DURING CONSTRUCTION OPERATIONS. NCDOT, DESIGN CONSULTANT WILL NOT BE HELD RESPONSIBLE FOR THE ACCURACY OF LOCATION, SIZE, DEPTH, OR COMPLETENESS OF THE INFORMATION. THE CONTRACTOR SHALL VERIFY LOCATION AND DEPTH OF ALL UNDERGROUND UTILITIES PRIOR TO CONSTRUCTION.

8. THE CONTRACTOR SHALL SUPPORT AND PROTECT ANY EXISTING UNDERGROUND UTILITIES ENCOUNTERED DURING TRENCH EXCAVATION AND/OR PIPE INSTALLATION.

9. MINIMUM PIPE SEPARATION: 10 FEET HORIZONTAL SEPARATION OR 18" VERTICAL SEPARATION SHALL BE MAINTAINED BETWEEN WATER MAINS OVER SEWER MAINS. WHEN WATER MAINS ARE BELOW SEWER MAINS OR THE ABOVE MINIMUM SEPARATIONS CANNOT BE MAINTAINED, DUCTILE IRON PIPE SHALL BE USED FOR BOTH MAINS TO 10 FEET ON EITHER SIDE OF THE CROSSINGS, AND ALL ALONG THE LENGTH OF MAINS WHERE MINIMUM SEPARATION CANNOT BE MAINTAINED.

10. ALL PROPOSED 6"-12" WATER LINES TO BE DUCTILE IRON PC350, AND 16" WATER LINES TO BE DUCTILE IRON PC250.

11. WELL IN ADVANCE OF BEGINING UTILITY WORK, SOFT DIGS SHALL BE PERFORMED BY CONTRACTOR TO VERIFY ACTUAL WATER LINE DEPTH AND MATERIAL AT PROPOSED TIE-IN LOCATIONS.

12. LAY PIPE STRAIGHT IN ALIGNMENT AND GRADIENT OR FOLLOW TRUE CURVES AS NEARLY AS POSSIBLE. DO NOT DEFLECT ANY JOINT MORE THAN HALF THE MAXIMUM DEFLECTION RECOMMENDED BY THE MANUFACTURER.

13. CONTRACTOR SHALL ADHERE TO SECTION 1530 "ABANDON OR REMOVE UTILITIES" FOR ABANDONMENT OF EXISTING WATER LINES.

14. CONTRACTOR SHALL COORDINATE SHUTDOWNS OF WATER LINESFOR TIE-INS A MINIMUM OF 96 HOURS IN ADVANCE OF TIE-IN OPERATIONS. COORDINATE WITH UNION COUNTY FIELD REPRESENTATIVE.

15. ALL DUCTILE IRON WATER PIPE SHALL BE FURNISHED WITH CEMENT MORTAL LINING AND SEAL COATING IN ACCORDANCE WITH ANSI/AWWA A21.4/C104.

16. ALL DUCTILE IRON SEWER PIPE SHALL BE FURNISHED WITH CERAMIC EPOXY LINING, TNEMEC 431 OR EQUAL, AND SEAL COATED IN ACCORDANCE WITH ANSI/AWWA A21.4/C104.

17. PRIOR TO THE START OF PROJECT, CONTRACTOR MUST CONTACT THOMAS MANN,CIP PROGRAM MANAGER, OF UNION COUNTY WATER. UNION COUNTY WATER MAY INSPECT THE WORK AT ANY TIME.

18. NO INTERRUPTION OF EXISTING WATER SERVICE SHALL BE MADE DURING CONSTRUCTION UNTIL AUTHORIZED BY UNION COUNTY WATER. UNION COUNTY WATER WILL BE COPIED ON BOTH THE WATER MAIN PRESSURE TEST REPORT AND THE WATER MAIN CHLORINATION TEST REPORT. UNION COUNTY COLLECTS SAMPLES FOR BACTERIOLOGICAL TESTING. SAMPLES WILL BE COLLECTED ONLY ON WEDNESDAY MORNINGS, USUALLY BEFORE 9:00 AM. SCHEDULE WATER INSTALLATIONS AND PRESSURE TESTING ACCORDINGLY. THERE WILL BE NO COST TO THE CONTRACTOR FOR BACTERIOLOGICAL TESTING FOR THE FIRST SAMPLES COLLECTED FOR EACH SEGMENT. CONTRACTOR WILL BE RESPONSIBLE FOR COSTS RELATED TO RE-TESTING FOR FAILING BACTERIOLOGICAL SAMPLES AT THE PREVAILING RATES OF THE TESTING LABORATORY. PRICE IS SUBJECT TO CHANGE. UNION COUNTY WILL NOT ACCEPT TEST RESULTS FROM OUTSIDE TESTING LABS.

19. EXISTING WATER VALVES ARE TO BE OPERATED BY UNION COUNTY OPERATIONS STAFF.

20. WHEN ABANDONING VALVES, CLOSE VALVE BEFORE REMOVING VALVE BOX.

21. INSTALLATION OF PIPE MAY REQUIRE EXCAVATING AROUND AND BENEATH RELOCATED TELECOMMUNICATION AND OTHER UTILITY LINES FOR WATER RELOCATION.

22.PROPOSED WATER SERVICE LINE SHALL BE TYPE "K" COPPER TUBING. SPLICING OF COPPER SERVICE LINE BETWEEN THE WATER METER AND EXISTING OR NEW WATER LINES WILL NOT BE ALLOWED FOR ANY CASE. PROVIDE AND INSTALL A CONTINUOUS SEGMENT OF COPPER WATER SERVICE LINE BETWEEN THE CORPORATION STOP AND WATER MATER. IN THE EVENT A WATER SERVICE PIPE IS DAMAGED DURING THE COURSE OF CONSTRUCTION, A NEW REPLACEMENT COPPER SERVICE LINE IS TO BE INSTALLED BETWEEN THE WATER LINE AND WATER METER AT NO COST TO UNION COUNTY OR NCDOT.

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-3
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T. KRATZ

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UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

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UTILITY CONSTRUCTION

PROJECT SPECIFIC NOTES:

22. IN ACCORDANCE WITH SECTION 1500-7 - SUBMITTALS AND RECORDS,CONTRACTOR TO PROVIDE AS-BUILT PLANS OF THE INSTALLED UTILITY. UPON COMPLETION OF PRESSURE TESTING AND BACTERIOOGICAL TESTING AND PRIOR TO REQUESTING WATER SYSTEM ISOLATION FOR CONNECTION OF THE NEW WATER PIPE TO THE EXISTING WATER SYSTEM, PROVIDE RED-LINE MARK-UPS OF THE WATER LINE IMPROVEMENTS TO UNION COUNTY FOR REVIEW AND COMMENT. UNION COUNTY WILL THEN REQUEST ACCEPTANCE OF THE WATER IMPROVEMENTS FROM NCDEQ PUBLIC WATER SUPPLY SECTION. UPON ACCEPTANCE BY PUBLIC WATER SUPPLY SECTION, UNION COUNTY WILL WORK WITH CONTRACTOR TO SCHEDULE TIE-INS TO THE EXITING SYSTEM.

23. IN ACCORDANCE WITH SECTION 1500-7 - SUBMITTALS AND RECORDS, CONTRACTOR TO PROVIDE AS-BUIT PLANS OF THE INSTALLED UTILITY. IN ADDITION TO THE HARD COPIES REQUIRED BY THE SPECIFICATIONS, PROVIDE THE SAME PDF FILES REQUIRED FOR SUBMISSION TO NCDOT TO UNION COUNTY. UNION COUNTY WILL NOT ACCEPT THE WORK FROM CONTRACTOR AND NCDOT UNTIL AS-BUILTS ARE RECEIVED AS AS-BUILTS ARE NEEDED AS PART OF THE FINAL PERMIT APPROVALS FROM NCDEQ PUBLIC WATER SUPPLY SECTION.

24.UTILITY CONTRACTOR(S) SHALL BE PRESENT AND ASSIST WITH FINAL INSPECTIONS OF NEW WATER AND SEWER LINES AND SERVICES.

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-3A
DESIGNED BY: TK	
DRAWN BY: TK	
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1/2/2026
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SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

16" VALVE
-WL2- STA. 10+13.21
16" PLUG W/ 2" TAP
-WL1- STA. 10+08.21
11 LF 2" WATER LINE
-WL2- RJ DIP PC250
2" VALVE
-WL2- STA. 10+03.21
2" BLOW OFF
-WL2- STA. 9+98.00
CONNECT TO 16" WATER LINE
TIP PROJECT U-4714A BY OTHERS
N: 488019.3952
E:1494645.1291

END TIP PROJECT U-4714AC
-L- POT STA. 193+50.61 LB=
BEGIN TIP PROJECT U-4714BA
-L- POT STA. 10+00.00 LA

2-45° BEND (HORZ.)
-WL2- STA. 10+19.06
-WL2- STA. 10+55.18

710 LF 16" WATER LINE
-WL2- RJ DIP PC250, 7,865 LF TOTAL

20 LF 24" ENCASEMENT PIPE

CONTRACTOR TO FIELD LOCATE EXIST. 4" SEWER SERVICE AND EXTEND TO NEW R/W AND INSTALL NEW CLEAN-OUT (CONTINUED ON UC-5)

CL-I RIP RAP
EST. 40 TONS
100 S.Y. GEOTEXTILE

INV. = 718.0'
72" CL-V RCP
BURIED W/CONC. SILL
SKEW = 45
(DETAIL 4-3)

CL-B RIP RAP
EST. 2 TONS
7 S.Y. GEOTEXTILE

CL-I RIP RAP
EST. 5 TONS
14 S.Y. GEOTEXTILE

-WL1- STA. 8+78.26
CONNECT TO 6" WATER LINE
TIP PROJECT U-4714A BY OTHERS
22.5° BEND (HORZ.)
-WL1- STA. 9+03.26
RECONNECT WATER METER
107 LF 6" WATER LINE
-WL1- RJ DIP PC350
8"X6" REDUCER
-WL1- STA. 9+84.69
RECONNECT WATER METER
22.5° BEND (HORZ.)
-WL1- STA. 10+12.95
8" VALVE
-WL1- DEFLECTION
BEGIN STA: 10+65.13
END STA: 10+94.28
BEND RADIUS: 459.0'
RECONNECT WATER METER
-WL1- DEFLECTION
BEGIN STA: 11+23.97
END STA: 11+45.76
BEND RADIUS: 459.0'

RECONNECT WATER METER
FIRE HYDRANT
6" VALVE
5 LF FIRE HYDRANT LEG
8"X8"X6" FH TEE
-WL1- STA. 12+61.53
-WL1- DEFLECTION
BEGIN STA: 13+17.28
END STA: 13+23.45
BEND RADIUS: 459.0'
725 LF 8" WATER LINE
-WL1- RJ DIP PC350, 3748 LF TOTAL
RECONNECT WATER METER
10 LF 8" SANITARY GRAVITY SEWER
-SS1- PVC SDR 26
STUB-OUT OF MANHOLE #3A W/ PVC SDR 26, MAINTAIN SLOPE & INVERT OF EXIST. 8" SEWER
4' DIA. UTILITY MANHOLE
SSMH-3, -SS1- STA. 3+40.30
OUTSIDE DROP MANHOLE
270 LF 8" SANITARY GRAVITY SEWER
-SS1- PVC SDR35

22.5° BEND (HORZ.)
-WL1- STA. 15+66.91
22.5° BEND (HORZ.)
-WL1- STA. 15+96.57
20 LF 16" ENCASEMENT PIPE
-WL1- DEFLECTION
BEGIN STA: 16+32.79
END STA: 16+54.42
BEND RADIUS: 459.0'
OUTLET PROTECTION
EST. 55 TONS TOTAL
145 S.Y. GEOTEXTILE
4' DIA. UTILITY MANHOLE
SSMH-2, -SS1- STA. 0+70.63
-WL1- DEFLECTION
BEGIN STA: 16+54.42
END STA: 16+76.13
BEND RADIUS: 459.0'
40 LF 16" ENCASEMENT PIPE
71 LF 8" SANITARY GRAVITY SEWER
-SS1- DIP PC350
4' DIA. UTILITY MANHOLE
SSMH-1, -SS1- STA. 0+00.00

MATCHLINE – SEE SHEET UC-5

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 2675 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-4
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

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UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

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NOTES:

1. CONTRACTOR TO FIELD LOCATE EXIST. 4" SANITARY SEWER. APPROX. LOCATION SHOWN.
2. SSMH-4 NO LONGER INCLUDED.
3. 8" VALVE TO BE CLOSED UPON ACTIVATION OF 16" & 8" WATER LINE.

SCALE 1" = 50'

0 50 100 150 200

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-5
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

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NAD 83/NA 2011

122 LF 6" WATER LINE
-WL1B-RJ DIP PC350, 685 LF TOTAL
46 LF 8" SANITARY GRAVITY SEWER
-SS2- PVC SDR 26
CONNECT TO EXISTING MANHOLE
6" VALVE
-WL1B- STA. 11+94.19
8"X6" REDUCER
-WL1B- STA. 11+86.69
TIE-IN TO EXIST. 8" PVC WATER LINE W/ SOLID SLEEVE
2-45° BEND
8" VALVE
8"X8"X8" TEE
-WL1B- STA. 11+35.05
FIRE HYDRANT
6" VALVE
10 LF FIRE HYDRANT LEG
6"X6"X6" FH TEE
-WL1B- STA. 11+19.79
187 LF 8" WATER LINE
-WL1B-RJ DIP PC350
90° BEND
8"X8"X8" TEE
-WL1B- STA. 11+01.93
90° BEND
8" VALVE
SEE NOTE 3
16"X16"X8" TEE
-WL2- STA. 26+91.78
90 LF 16" ENCASEMENT PIPE
DEFLECT 1 JOINT 0.26°
-WL2- STA. 25+09.47

1201 LF 16" WATER LINE
-WL2- RJ DIP PC250, 7,865 LF TOTAL

-WL1A- STA. 11+54.07
TIE-IN TO EXIST. 6" PVC WATER LINE W/ SOLID SLEEVE
45° BEND (HORZ.)
-WL1A- STA. 11+44.07
8" VALVE
-WL1A- STA. 11+24.98
2-22.5° BEND (ROTATED)
-WL1A- STA. 11+16.98
-WL1A- STA. 11+32.32
FIRE HYDRANT
6" VALVE
5 LF FIRE HYDRANT LEG
RELOCATE WATER METER
6"X6"X6" FH TEE
-WL1A- STA. 11+06.01
157 LF 6" WATER LINE
-WL1A- RJ DIP PC350
35'x10' BORE PIT
CONTRACTOR TO FIELD LOCATE EXIST. 4" SEWER SERVICE AND EXTEND TO NEW R/W AND INSTALL NEW CLEAN-OUT (CONTINUED ON UC-4)
RELOCATE WATER METER
CONTRACTOR TO VERIFY SANITARY SEWER LATERAL AND WATER METER IS PLUGGED AND ABANDONED.

MATCHLINE - SEE SHEET UC-4

MATCHLINE - SEE SHEET UC-6

8" VALVE
-WL1- STA. 20+31.22

-WL1- DEFLECTION
BEGIN STA: 17+54.88
END STA: 17+77.94
BEND RADIUS: 459.0'
RELOCATE WATER METER
-WL1- DEFLECTION
BEGIN STA: 17+12.94
END STA: 17+35.93
BEND RADIUS: 459.0'
8"X8"X6" TEE
-WL1- STA. 20+36.22
-WL1A- STA. 10+00.00
10'X10' RECEIVING PIT

ENCASEMENT PIPE
51' LF BORE AND JACK OF 12"
1205 LF 8" WATER LINE
-WL1- DIP PC350, 3748 LF TOTAL
FIRE HYDRANT
6" VALVE
10 LF FIRE HYDRANT LEG
8"X8"X6" FH TEE
-WL1- STA. 23+09.39
8" VALVE
-WL1- STA. 23+35.00
8"X8"X6" TEE
-WL1- STA. 23+53.17
6" VALVE
RELOCATE WATER METER
11.25° BEND
RETAIN SANITARY SEWER CLEAN-OUT
84 LF 6" WATER LINE
RJ DIP PC350
22.5° BEND
TIE-IN TO EXIST. 6" PVC WATER LINE W/ SOLID SLEEVE

45° BEND (HORZ.)
-WL1- STA. 25+85.52
2-22.5° BEND (ROTATED)
-WL1- STA. 26+01.82
8" VALVE
-WL1- STA. 27+01.93
8"X8"X6" TEE
-WL1- STA. 27+06.93
-WL1B- STA. 10+00.00
8" VALVE
-WL1- STA. 27+11.93
8"X8"X6" TEE
-WL1- STA. 27+19.67
6" VALVE
22.5° BEND
67 LF 6" WATER LINE
RJ DIP PC350
45° BEND
TIE-IN TO EXIST. 6" PVC WATER LINE W/ SOLID SLEEVE
32 LF 16" ENCASEMENT PIPE
RELOCATE WATER METER

16" VALVE
-WL2- STA. 26+80.00

EXIST. 4" SANITARY SEWER APPROX. LOCATION CONNECT TO PROP. MANHOLE
4' DIA. UTILITY MANHOLE
SSMH-7, -SS2- STA. 1+18.01
SEE NOTE 1
33 LF 8" SANITARY GRAVITY SEWER
-SS2- PVC SDR35
4' DIA. UTILITY MANHOLE
SSMH-6, -SS2- STA. 0+85.59
40 LF 8" SANITARY GRAVITY SEWER
-SS2- PVC SDR35
4' DIA. UTILITY MANHOLE
SSMH-5, -SS2- STA. 0+45.95
22.5° BEND (HORZ.)
-WL1- STA. 28+65.52
22.5° BEND (ROTATED)
-WL1- STA. 28+39.95

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 5235 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

MAXIMILLIAN CHESTER QUENTIN VUURMANS DB 5117 PG 448 PB F PG 844
2014-IH BORROWER, LP DB 6236 PG 590 PB F PG 844 (EXHIBIT A-10)
JOHNATHAN M WILSON JACQUELINE W WILSON DB 1583 PG 535 PB F PG 844
JEFFREY A ALRED DB 3827 PG 548 PB F PG 844
MARK DAVID BROOKS DB 7235 PG 204
SEAN ERIC WILLIAMS MALIA WILLIAMS DB 3763 PG 227
MORNINGSIDE MEADOWS HOMEOWNERS ASSOCIATION, INC. DB 1349 PG 699
PARK MEADOWS DEVELOPMENT, LLC DB N/F PG N/F
RAMON S BUTCHER AND WIFE TIFFANY M BUTCHER DB 1349 PG 699
EDWARD R. BENVENUTI, JR. & WIFE DIANA K. BENVENUTI DB 5164 PG 730
CLAYTON A. HAILE AND WIFE MELANIE S. HAILE DB 748 PG 242
HUNT FREDRICK G. AND WIFE CINDI S DB N/F PG N/F
SHAWN D TEAGALL AND WIFE MELINDA C TEAGALL DB 6262 PG 539
JOHN GRAY DB 6105 PG 61
JORNAN JOHNSON DB 7165 PG 1
DEPARTMENT OF TRANSPORTATION DB 5944 PG 1
DB 4862 PG 613
DB 3227 PG 548

2/2/2026
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NOTES:

1. CONTRACTOR TO FIELD LOCATE EXIST. 4" SANITARY SEWER. APPROX. LOCATION SHOWN.
2. SSMH-8, SSMH-9, AND THE 8" SEWER BETWEEN THEM ARE TO BE INSTALLED, TESTED, AND ACTIVATED IN ONE NIGHT OF WORK.
3. TEST ALL NEW DOWNSTREAM SEWER PIPE AND NEW MANHOLES PRIOR TO SETTING AND CONNECTING TO MANHOLE.

NAD 83/NA 2011

SCALE 1" = 50'
0 50 100 150 200

4' DIA. UTILITY MANHOLE
SSMH-8, -SS3- STA. 0+00.00
SEE NOTE 2

FIRE HYDRANT
6" VALVE
8 LF FIRE HYDRANT LEG

6"X6"X6" FH TEE
-WL1B- STA. 16+52.55

62 LF 8" SANITARY GRAVITY SEWER
-SS3- PVC SDR35

4' DIA. UTILITY MANHOLE
SSMH-9, -SS3- STA. 0+62.09
SEE NOTE 2

-WL1B- DEFLECTION
BEGIN STA: 15+89.71
END STA: 16+55.36
BEND RADIUS: 764.0'

74 LF 16" ENCASEMENT PIPE

-WL2- DEFLECTION
BEGIN STA: 31+89.64
END STA: 32+55.29
BEND RADIUS: 764.0'

-WL2- DEFLECTION
BEGIN STA: 31+08.41
END STA: 31+49.76
BEND RADIUS: 764.0'

-WL1B- DEFLECTION
BEGIN STA: 15+08.44
END STA: 15+49.79
BEND RADIUS: 764.0'

-WL1B- STA. 18+71.13
TIE-IN TO EXIST. 6" PVC
WATER LINE W/ SOLID SLEEVE
45° BEND (ROTATED)
-WL1B- STA. 18+56.13
45° BEND (HORZ.)
-WL1B- STA. 18+39.47

563 LF 6" WATER LINE
-WL1B-RJ DIP PC350, 685 LF TOTAL

11.25° BEND (ROTATED)
-WL1B- STA. 16+90.86

6" VALVE
-WL1B- STA. 17+31.02
90° BEND (ROTATED)
-WL1B- STA. 17+12.49

2-45° BEND
-WL2- STA. 33+51.74 (ROTATED)
-WL2- STA. 33+71.96 (HORZ.)

-WL2- DEFLECTION
BEGIN STA: 33+80.86
END STA: 34+05.62
BEND RADIUS: 764.0'

RELOCATE WATER METER

2-45° BEND (HORZ.)
-WL2- STA. 35+09.79
-WL2- STA. 35+30.04

117 LF 24" ENCASEMENT PIPE

2" BLOW OFF
-WL1C- STA. 11+58.80
REFER TO UNION COUNTY STANDARD DETAIL 2A

12 LF 2" WATER LINE
-WL1C- RJ DIP PC350

2" VALVE
-WL1C- STA. 11+55.80
8" PLUG W/ 2" TAP
-WL1C- STA. 11+47.15

8" VALVE
-WL1C- STA. 11+42.15

147 LF 8" WATER LINE
-WL1C- RJ DIP PC350

FIRE HYDRANT
6" VALVE
8 LF FIRE HYDRANT LEG

8"X8"X6" FH TEE
-WL1C- STA. 11+30.39

10'X10' RECEIVING PIT

22.5° BEND (ROTATED)
-WL2- STA. 38+91.74

16" VALVE
-WL2- STA. 38+78.94

22.5° BEND (HORZ.)
-WL2- STA. 38+68.27

RELOCATE WATER METER

1421 LF 16" WATER LINE
-WL2- RJ DIP PC250
7,865 LF TOTAL

22.5° BEND (HORZ.)
-WL2- STA. 40+54.05

22.5° BEND (HORZ.)
-WL2- STA. 40+62.59

2-22.5° BEND (HORZ.)
-WL2- STA. 41+24.45
-WL2- STA. 41+29.59

RELOCATE WATER METER

-WL2- DEFLECTION
BEGIN STA: 41+29.59
END STA: 41+74.87
BEND RADIUS: 764.0'

-WL2- DEFLECTION
BEGIN STA: 41+74.87
END STA: 42+40.34
BEND RADIUS: 764.0'

-WL2- DEFLECTION
BEGIN STA: 42+40.34
END STA: 42+75.43
BEND RADIUS: 764.0'

RELOCATE WATER METER

DEFLECT 1° JOINT 1.5°
-WL2- STA. 30+05.42
1.48° DEFLECTION
WL1B- STA 14+06.09

11.25° BEND (HORZ.)
-WL1-E STA. 31+21.00
11.25° BEND (HORZ.)
-WL1- STA. 31+36.43

RELOCATE WATER METER
1.75° DEFLECTION(HORZ.)
-WL1- STA. 29+81.38

8"X8"X6" TEE
-WL1- STA. 32+17.63

8" VALVE
-WL1- STA. 32+22.13

FIRE HYDRANT
6" VALVE
7 LF FIRE HYDRANT LEG

6"X6"X6" FH TEE
SEE SHEET UC-3D FOR DETAIL 7A

11.25° BEND (HORZ.)
-WL1- STA. 32+42.62
11.25° BEND (HORZ.)
-WL1- STA. 32+28.29

82 LF 8" SANITARY GRAVITY SEWER
-SS3- DIP PC350

4' DIA. UTILITY MANHOLE
SSMH-10, -SS3- STA. 1+54.18

6" PLUG W/ 2" TAP
2" VALVE
45° BEND
21 LF 2" WATER LINE
PVC 1120
22.5° BEND
CONNECT TO EXISTING 2" PVC WATER LINE

107 LF 8" SANITARY GRAVITY SEWER
-SS3- DIP PC350

4' DIA. UTILITY MANHOLE
SSMH-11, -SS3- STA. 2+61.14
SEE NOTE 1 & NOTE 3

EXIST. 4" SAN. SEWER
APPROX. LOCATION

0.246° DEFLECTION(HORZ.)
-WL1- STA. 34+52.65

2-RELOCATE WATER METER

0.23° DEFLECTION(HORZ.)
-WL1- STA. 37+80.51

1400 LF 8" WATER LINE
-WL1- RJ DIP PC350, 3748 LF TOTAL

RELOCATE WATER METER

3-RELOCATE WATER METER
1.20° DEFLECTION (HORZ.)
-WL1- STA. 40+38.54

2-RELOCATE WATER METER

125 LF 16" ENCASEMENT PIPE
65 LF BORE AND JACK OF 16"

8" VALVE
-WL1- STA. 38+93.41

35'X10' BORE PIT

8"X8"X8" TEE
-WL1- STA. 38+88.40
-WL1C- STA. 9+87.06

MATCHLINE - SEE SHEET UC-5

MATCHLINE - SEE SHEET UC-7

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 8000 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-6
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
Charlotte, NC 28203
NC License Number F-0991

NOTES:

1. CONTRACTOR TO FIELD LOCATE EXIST. 4" SANITARY SEWER. APPROX. LOCATION SHOWN.

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-7
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

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2151 Hawkins Street, Suite 1400
Charlotte, NC 28203
NC License Number F-0991

45° BEND (HORZ.)
-WL2 STA. 43+82.74

10 LF 8" SANITARY GRAVITY SEWER
-SS4A- DIP PC350
STUB-OUT OF MANHOLE # W/ DIP PC350, MAINTAIN SLOPE & INVERT OF EXIST. 8" SEWER

4' DIA. UTILITY MANHOLE
SSMH-16, -SS4A- STA. 0+88.27
OUTSIDE DROP MANHOLE

89 LF 8" SANITARY GRAVITY SEWER
-SS4A- DIP PC350

45° BEND (HORZ.)
-WL2- STA. 44+21.68

16" VALVE
-WL2- STA. 44+26.68

2-RELOCATE WATER METER

45° BEND
-WL1D- STA. 11+45.00

6" VALVE
-WL1D- STA. 11+60.00

6" PLUG W/ 2" TAP
-WL1D- STA. 11+65.00

-WL1D- STA. 11+81.48
TIE-IN TO EXIST. 2" PVC WATER LINE W/ SOLID SLEEVE

16 LF 2" WATER LINE
RJ DIP PC350

45° BEND
-WL1D- STA. 11+71.48

FIRE HYDRANT
6" VALVE
6 LF FIRE HYDRANT LEG
6"X6"X6" FH TEE
-WL1D- STA. 11+42.00

10'X10' RECEIVING PIT

4' DIA. UTILITY MANHOLE
SSMH-12, -SS4- STA. 0+00.00
SSMH-12, -SS4A- STA. 0+00.00

2-45° BEND (HORZ.)
-WL2- STA. 45+09.98
-WL2- STA. 45+27.70

42 LF 8" SANITARY GRAVITY SEWER
-SS4- PVC SDR26

4' DIA. UTILITY MANHOLE
SSMH-13, -SS4- STA. 0+42.39

11 LF 8" SANITARY GRAVITY SEWER
PVC SDR26 (EXTEND AT EXIST. SLOPE)

128 LF 8" SANITARY GRAVITY SEWER
-SS4- PVC SDR26

FIRE HYDRANT
6" VALVE
6 LF FIRE HYDRANT LEG
16"X16"X6" FH TEE
-WL2- STA. 50+09.51

30 LF 6" WATER LINE
RJ DIP PC350

1415 LF 16" WATER LINE
-WL2- RJ DIP PC250, 7,865 LF TOTAL

16" VALVE
-WL2- STA. 53+92.11

58 LF 24" ENCASEMENT PIPE

16"X16"X6" TEE
-WL2- STA. 53+16.75
-WL2A- STA. 10+00.00

10'X10' RECEIVING PIT
-WL2- DEFLECTION
BEGIN STA: 52+51.59
END STA: 53+07.30
BEND RADIUS: 764.0'

-WL2- DEFLECTION
BEGIN STA: 51+38.63
END STA: 52+08.32
BEND RADIUS: 764.0'

TIE-IN TO EXIST. 6" PVC WATER LINE W/ SOLID SLEEVE DIP TO PVC TRANSITION COUPLING

22.5° BEND

11.25° BEND

16"X16"X6" TEE
-WL2- STA. 54+09.86

-WL2- DEFLECTION
BEGIN STA: 56+79.77
END STA: 57+62.02
BEND RADIUS: 764.0'

RELOCATE WATER METER

-WL2- DEFLECTION
BEGIN STA: 55+99.09
END STA: 56+72.53
BEND RADIUS: 764.0'

-WL2- DEFLECTION
BEGIN STA: 54+24.18
END STA: 54+51.61
BEND RADIUS: 764.0'

2-RELOCATE WATER METER

MATCHLINE - SEE SHEET UC-6

MATCHLINE - SEE SHEET UC-8

118 LF 12" ENCASEMENT PIPE
98 LF BORE AND JACK OF 12"

49 LF 6" WATER LINE
-WL1D- RJ DIP PC350

35'X10' BORE PIT

8"X8"X6" TEE (ROTATED)
-WL1- STA. 44+25.86
-WL1D- STA. 10+00.00

8" VALVE
-WL1- STA. 44+30.96

2-22.5° BEND (HORZ.)
-WL1- STA. 44+60.27
-WL1- STA. 44+83.51

8" PLUG

22.5° BEND (HORZ.)
-WL1- STA. 47+32.52
REMOVE EXIST. 90° BEND AND TIE-IN TO EXIST 8" PVC WATER LINE W/ 8" SLEEVE

2-22.5° BEND (HORZ.)
-WL2- STA. 45+67.52
-WL2- STA. 45+87.16

RECONNECT WATER METER

4' DIA. UTILITY MANHOLE
SSMH-15, -SS4- STA. 2+39.55

RELOCATE WATER METER

2" BLOWOFF

2" VALVE

71 LF 8" SANITARY GRAVITY SEWER
-SS4- DIP PC350

4' DIA. UTILITY MANHOLE
SSMH-14, -SS4- STA. 1+69.30

RELOCATE WATER METER

2" VALVE

227 LF 2" WATER LINE

8" PLUG W/ 2" TAP
8"X8"X8" TEE
-WL1- STA. 44+95.26

8" VALVE
-WL1- STA. 45+13.31

11.25° BEND (HORZ.)
-WL1- STA. 45+18.31

45° BEND (HORZ.)
-WL1- STA. 45+23.06

22.5° BEND (HORZ.)
-WL1- STA. 45+83.43

418 LF 8" WATER LINE
-WL1- RJ DIP PC350, 3748 LF TOTAL

2-RELOCATE WATER METER

123 LF 8" SANITARY GRAVITY SEWER
-SS5- PVC SDR 26

4' DIA. UTILITY MANHOLE
SSMH-17, -SS5- STA. 1+23.12

RELOCATE WATER METER

151 LF 8" SANITARY GRAVITY SEWER
-SS5- PVC SDR26

4' DIA. UTILITY MANHOLE
SSMH-18, -SS5- STA. 2+73.56
SEE NOTE 1

EXIST. 4" SAN. SEWER APPROX. LOCATION

RELOCATE WATER METER

45 LF 12" ENCASEMENT PIPE
69 LF BORE AND JACK OF 12"

45° BEND (ROTATED)
-WL2A- STA. 11+59.97

219 LF 6" WATER LINE
-WL2A- RJ DIP PC350

FIRE HYDRANT
6" VALVE
12 LF FIRE HYDRANT LEG
6"X6"X6" FH TEE
-WL2A- STA. 11+92.32

45° BEND (HORZ.)
-WL2A- STA. 12+08.88

-WL2A- STA. 12+18.88
TIE-IN TO EXIST. 6" PVC WATER LINE W/ SOLID SLEEVE

4' DIA. UTILITY MANHOLE
SSMH-25, -SS6- STA. 7+96.81

166 LF 8" SANITARY GRAVITY SEWER
-SS6- PVC SDR26 (230 LF TOTAL)

2-RELOCATE WATER METER

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 6805 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

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13 LF 8" SANITARY GRAVITY SEWER
-SS6- DIP PC350
16 LF 4" SANITARY GRAVITY SEWER
4' DIA. UTILITY MANHOLE
SSMH-20, -SS6- STA. 0+12.93
SANITARY SEWER CLEAN-OUT
207 LF 8" SANITARY GRAVITY SEWER
-SS6- PVC SDR35
2-RELOCATE WATER METER
86 LF 24" ENCASEMENT PIPE
4' DIA. UTILITY MANHOLE
SSMH-21, -SS6- STA. 2+19.73
45° BEND (HORZ.)
-WL2- STA. 60+79.12
36 LF 8" SANITARY GRAVITY SEWER
-SS6- PVC SDR35
RELOCATE WATER METER
4' DIA. UTILITY MANHOLE
SSMH-22, -SS6- STA. 2+55.20
45° BEND (HORZ.)
-WL2- STA. 60+43.28
72 LF 8" SANITARY GRAVITY SEWER
-SS6- PVC SDR26
11.25° BEND (HORZ.)
-WL2- STA. 60+16.84
22.5° BEND (ROTATED)
-WL2- STA. 60+11.67
45° BEND (HORZ.)
-WL2- STA. 59+92.92
FIRE HYDRANT
6" VALVE
20 LF FIRE HYDRANT LEG
16"X16"X6" FH TEE
-WL2- STA. 57+74.91
22.5° BEND (HORZ.)
-WL2- STA. 57+62.02
22.5° BEND (ROTATED)
-WL2- STA. 58+16.57
-WL2- DEFLECTION
BEGIN STA: 58+69.80
END STA: 59+90.02
BEND RADIUS: 764.0'

4' DIA. UTILITY MANHOLE
SSMH-19, -SS6- STA. 0+00.00
SSMH-19, -SS6B- STA. 0+00.00
DOGHOUSE MANHOLE
CONTRACTOR TO ENSURE CONSTRUCTION OF PROP. DRAINAGE CATCH BASIN DOES NOT IMPACT PROP. MANHOLE
-WL3- STA. 13+23.07
TIE-IN TO EXIST. 6" AC WATER LINE W/ EJ PRESCOTT STYLE 501 COUPLING OR EQUAL
10 LF 6" WATER LINE
-WL3- RJ DIP PC350
8"X6" REDUCER
-WL3- STA. 13+13.07
8" VALVE
-WL3- STA. 13+08.07
57 LF 8" SANITARY GRAVITY SEWER
-SS6B- DIP PC350
20 LF 16" ENCASEMENT PIPE
2-22.5° BEND (HORZ.)
-WL3- STA. 12+00.00
-WL3- STA. 12+23.07
293 LF 8" WATER LINE
-WL3- RJ DIP PC350
2-45° BEND (HORZ.)
-WL3- STA. 10+15.00
-WL3- STA. 10+32.61
8" VALVE
-WL3- STA. 10+05.00
16"X16"X8" TEE
-WL3- STA. 10+00.00
90° BEND (HORZ.)
-WL2- STA. 61+80.79
2-45° BEND (HORZ.)
-WL2- STA. 61+92.93
-WL2- STA. 62+14.38
16" VALVE
-WL2- STA. 62+23.91
16"X16"X16" TEE
-WL2- STA. 62+28.41
-WL4- STA. 10+00.00
16" VALVE
-WL4- STA. 10+03.50
45° BEND (HORZ.)
-WL2- STA. 62+32.78
2-22.5° BEND (ROTATED)
-WL2- STA. 62+43.62
-WL2- STA. 62+65.70
2-RELOCATE WATER METER
RELOCATE RPZ BACKFLOW PREVENTION ASSEMBLY
35'x10' BORE PIT
RELOCATE WATER METER
4' DIA. UTILITY MANHOLE
SSMH-24, -SS6- STA. 5+66.81
64 LF 8" SANITARY GRAVITY SEWER
-SS6- PVC SDR26 (230 LF TOTAL)
241LF 8" SANITARY GRAVITY SEWER
-SS6- PVC SDR26
4' DIA. UTILITY MANHOLE
SSMH-23, -SS6- STA. 3+26.41
SSMH-23, -SS6A- STA. 0+00.00
OUTSIDE DROP MANHOLE
55 LF 8" SANITARY GRAVITY SEWER
-SS6A- PVC SDR26
RELOCATE WATER METER
4' DIA. UTILITY MANHOLE
SSMH-26, -SS6A- STA. 0+55.08
115 LF 24" ENCASEMENT PIPE
62 LF BORE AND JACK OF 24"
10'X10' RECEIVING PIT
90° BEND (ROTATED)
-WL4- STA. 11+39.85
45° BEND (HORZ.)
-WL4- STA. 11+64.04
22.5° BEND (ROTATED)
-WL4- STA. 11+76.16
22.5° BEND (HORZ.)
-WL4- STA. 12+00.21
RELOCATE WATER METER
SEE NOTE 1
393 LF 16" WATER LINE
-WL4- RJ DIP PC250, 930 LF TOTAL

RELOCATE RPZ BACKFLOW PREVENTION ASSEMBLY
RELOCATE WATER METER
RELOCATE WATER METER
RELOCATE RPZ BACKFLOW PREVENTION ASSEMBLY
-WL2- DEFLECTION
BEGIN STA: 63+66.79
END STA: 65+49.82
BEND RADIUS: 764.0'
-WL2- DEFLECTION
BEGIN STA: 65+57.58
END STA: 66+47.63
BEND RADIUS: 764.0'
1320 LF 16" WATER LINE
-WL2- RJ DIP PC250, 7,865 LF TOTAL
FIRE HYDRANT
6" VALVE
9 LF FIRE HYDRANT LEG
16"X16"X6" FH TEE
-WL2- STA. 66+62.27
2-22.5° BEND
-WL2- STA. 66+72.85 (HORZ.)
-WL2- STA. 67+01.21 (ROTATED)
10'x10' RECEIVING PIT
53 LF 24" ENCASEMENT PIPE
53 LF BORE AND JACK OF 24"
35'x10' BORE PIT
RELOCATE WATER METER
RELOCATE RPZ BACKFLOW PREVENTION ASSEMBLY
2-RELOCATE WATER METER
17 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35
2-RELOCATE WATER METER
4' DIA. UTILITY MANHOLE
SSMH-33, -SS7- STA. 1+02.85
2-RECONNECT WATER METER
DO NOT DISTURB EXISTING BACKFLOW PREVENTORS
182 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35, 400 LF TOTAL

MATCHLINE - SEE SHEET UC-7
MATCHLINE - SEE SHEET UC-9
MATCHLINE - SEE SHEET UC-20

SCALE 1" = 50'
0 50 100 150 200
NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-8
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
UTILITIES ENGINEERING SEC.
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FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ
UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
Charlotte, NC 28203
NC License Number F-0991

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 8785 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

NOTES:

1. CONTRACTOR VERIFY 3/4" WATER EMTER FEEDS SERVICE LINE TO 1" RPZ. TRACE SERVICE LINES AS NEEDED. IF WATER METER FEEDS RPZ, RELOCATE METER TO STA. 13+00±.

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-9
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
Charlotte, NC 28203
NC License Number F-0991

MATCHLINE - SEE SHEET UC-8

MATCHLINE - SEE SHEET UC-10

DEFLECT 1 JOINT 1.5°
-WL2- STA 71+03.41

RECONNECT WATER METER

RELOCATE WATER METER

RELOCATE RPZ BACKFLOW PREVENTION ASSEMBLY

FIRE HYDRANT
6" VALVE
8 LF FIRE HYDRANT LEG
16"X16"X6" FH TEE
-WL2- STA. 72+31.55

16" VALVE
-WL2- STA. 72+86.53

16"X16"X8" TEE
-WL2- STA. 72+99.22
-WL2B- STA. 10+00.00

8" VALVE
-WL2B- STA. 10+05.00

88 LF 16" ENCASEMENT PIPE

172 LF 8" WATER LINE
-WL2B- RJ DIP PC350

-WL2- DEFLECTION
BEGIN STA: 73+44.57
END STA: 74+09.60
BEND RADIUS: 764.0'

-WL2- DEFLECTION
BEGIN STA: 75+79.06
END STA: 76+73.59
BEND RADIUS: 764.0'

RELOCATE WATER METER
DO NOT DISTURB EXISTING BACKFLOW PREVENTOR

4' DIA. UTILITY MANHOLE
SSMH-32, -SS7- STA. 15+02.85

22.5° BEND (ROTATED)
-WL2B- STA. 11+61.25

-WL2B- STA. 11+71.25
TIE-IN TO EXIST. 8" WATER LINE W/ SOLID SLEEVE

218 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35 400 LF TOTAL

RECONNECT SANITARY SEWER CLEAN-OUT

2-45° BEND
-WL2B- STA. 11+02.03
(ROTATED)
-WL2B- STA. 11+25.28
(HORZ.)

22.5° BEND (HORZ.)
-WL2B- STA. 11+36.09

RELOCATE WATER METER

400 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35

RELOCATE WATER METER

4' DIA. UTILITY MANHOLE
SSMH-31, -SS7- STA. 11+02.85
SOLID LID

10'X10' RECEIVING PIT

2-RELOCATE RPZ BACKFLOW PREVENTION ASSEMBLY

35'X10' BORE PIT

RELOCATE WATER METER

FIRE HYDRANT
6" VALVE
106 LF FIRE HYDRANT LEG
-WL2C- STA. 11+03.35
FIRE HYDRANT & VALVE TO BE LOCATED ON STALLINGS FIRE DEPT. PROPERTY
FIRE HYDRANT TO BE POINTED TOWARDS FIRE DEPT.

246 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35

107 LF 16" ENCASEMENT PIPE
107 LF BORE AND JACK OF 16"

FIRE HYDRANT
6" VALVE
12 LF FIRE HYDRANT LEG
16"X16"X6" FH TEE
-WL2- STA. 78+37.61

1398 LF 16" WATER LINE
-WL2- RJ DIP PC250, 7,865 LF TOTAL

RELOCATE WATER METER

-WL2- DEFLECTION
BEGIN STA: 78+00.57
END STA: 78+39.99
BEND RADIUS: 764.0'

16"X16"X6" FH TEE
-WL2- STA. 77+93.03
-WL2C- STA. 10+00.00

10'X10' RECEIVING PIT

-WL2- DEFLECTION
BEGIN STA: 77+21.72
END STA: 77+86.45
BEND RADIUS: 764.0'

RELOCATE WATER METER

-WL2- DEFLECTION
BEGIN STA: 83+84.91
END STA: 85+40.10
BEND RADIUS: 764.0'

2-RELOCATE WATER METER

DEFLECT 1 JOINT 1.5°
-WL2- STA. 82+93.66

80 LF 12" ENCASEMENT PIPE
49 LF BORE AND JACK OF 12"

DEFLECT 1 JOINT 1.5°
-WL2- STA. 79+27.48

RELOCATE WATER METER

-WL2- DEFLECTION
BEGIN STA: 80+14.68
END STA: 80+52.39
BEND RADIUS: 764.0'

2-RELOCATE WATER METER

35'X10' BORE PIT

139 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35, 377 LF TOTAL

4' DIA. UTILITY MANHOLE
SSMH-29, -SS7- STA. 4+57.11
SOLID LID

400 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35

RELOCATE WATER METER

4' DIA. UTILITY MANHOLE
SSMH-30, -SS7- STA. 8+57.11

76 LF 6" SANITARY GRAVITY SEWER PVC SDR35

SANITARY SEWER CLEAN-OUT

11 LF 6" SANITARY GRAVITY SEWER PVC SDR35

SANITARY SEWER CLEAN-OUT

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 3130 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

K:\2026\U-4714B\Utilities\Sheets\U-4714B_UC_UC9.dgn
2/6/2026
tkrantz

NOTES:

1. INSTALL DUMMY VALVE BOXS OVER FORCEMAIN BENDS AND TIE-IN SLEEVES
2. APPROX. LOCATION OF SANITARY SEWER PER UNION COUNTY. CONTRACTOR TO FIELD LOCATE.

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-10
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
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NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

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NC License Number F-0991

11.25° BEND (HORZ.)
-WL5- STA. 11+23.53
12" VALVE
-WL5- STA. 11+28.53
162 LF 12" WATER LINE
-WL5- RJ DIP PC350
35'X10' BORE PIT
16"X12" CROSS
-WL2- STA. 86+23.75
-WL5- STA. 11+59.47
312 LF 16" WATER LINE
-WL2- RJ DIP PC250,
7,865 LF TOTAL

4' DIA. UTILITY MANHOLE
SSMH-27, -SS7- STA. 0+00.00
81 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35
22.5° BEND (HORZ.)
-WL2- STA. 87+30.28
4' DIA. UTILITY MANHOLE
SSMH-28, -SS7- STA. 0+80.21
SSMH-28, -SS7A- STA. 0+00.00
16" VALVE
-WL2- STA. 85+62.39
16"X8" REDUCER
-WL2- STA. 87+73.48
89 LF 8" WATER LINE
-WL2- RJ DIP PC350
22.5° BEND (HORZ.)
-WL2- STA. 88+52.75
-WL2- STA. 88+62.75
TIE-IN TO EXIST. 8" WATER MAIN WITH SOLID SLEEVE

11.25° BEND (HORZ.)
-WL5- STA. 10+10.00
-WL5- STA. 10+00.00 TIE-IN TO EXIST. 12" WATER MAIN
11.25° BEND
-WL5- STA. 10+98.46
10' X 10' RECIEVING PIT
45 LF 24" ENCASEMENT PIPE
45 LF BORE AND JACK OF 24"
16" VALVE
-WL2- STA. 85+62.39
11.25° BEND (HORZ.)
-WL2- STA. 85+57.39
35'X10' BORE PIT
12"X8" REDUCER
-WL5- STA. 11+62.39

ABANDON EXIST. WATER SERVICE
87 LF 8" SANITARY GRAVITY SEWER
-SS7A- PVC SDR35
3-RECONNECT WATER METER
120 LF 16" ENCASEMENT PIPE
120 LF BORE AND JACK OF 16"
10' X 10' RECIEVING PIT
END TIP PROJECT U-4714BA
BEGIN TIP PROJECT U-4714BB
-L- POT STA. 85+85.86
-LBA- POT STA. 12+74.95
FUTURE (PLANED) GARMON STORAGE SSMH
45° BEND (HORZ.)
-WL5- STA. 13+74.82
222 LF 8" WATER LINE
-WL5- RJ DIP PC350
-WL5- STA. 13+84.28
TIE-IN TO FUTURE 8" WATER MAIN BY GARMON STORAGE DEVELOPMENT. IF LINE HAS NOT BEEN CONSTRUCTED, INSTALL BLOW OFF DETAIL 2B AND RELOCATE METERS AND TRANSGER WATER SERVICES TO NEW WATER MAIN.

238 LF 8" SANITARY GRAVITY SEWER
-SS7- PVC SDR35, 377 LF TOTAL

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 6145 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

MATCHLINE - SEE SHEET UC-9

MATCHLINE - SEE SHEET UC-11

RAY B KILLOUGH DB 5106 PG 656

DENISE KILLOUGH WINDHAM
BRIAN NEAL WINDHAM
DB 4031 PG 737

RALPH KILLOUGH
DB N/F PG N/F

RAY BERNARD KILLOUGH
DB 3646 PG 330
REFERENCE MADE TO THIS DEED BUT NO DESCRIPTION FOUND

CREEKSIDE BIBLE CHURCH
DB 5572 PG 280

KENNETH GANTZ
NO INFO FOUND

LOT 4
ROBERT E JOHNSON
SALLY H JOHNSON
DB 1105 PG 848
PB B PG 158-B

LOT 3
JERRY B HUNEYCUTT
PB B PG 158-B

LOT 2
AKN HOLDINGS LLC
PB B PG 158-B

SR 1009 OLD MONROE RD

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-20
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

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NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

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Charlotte, NC 28203
NC License Number F-0991

TIE-IN TO EXIST. 8" WATER LINE
33 LF 8" WATER LINE
RJ DIP PC350
2-22.5° BEND
8" VALVE
16"X16"X8" TEE
-WL4- STA. 13+98.21
RELOCATE WATER METER
537 LF 16" WATER LINE
-WL4- RJ DIP PC250, 930 LF TOTAL
-WL4- DEFLECTION
BEGIN STA: 13+92.34
END STA: 15+89.93
BEND RADIUS: 1300.0'
RELOCATE RPZ BACKFLOW PREVENTION ASSEMBLY
RELOCATE WATER METER
2-45° BEND (HORZ.)
-WL4- STA. 15+89.93
-WL4- STA. 16+14.84
16"X16"X6" TEE
-WL4- STA. 16+20.18
16"X16"X6" TEE
-WL4- STA. 16+26.08
16"X16"X6" TEE
-WL4- STA. 17+48.99
RELOCATE WATER METER
2 - 16" VALVE
-WL4- STA. 13+93.21
-WL4- STA. 14+03.21
MATCHLINE - SEE SHEET UC-8
RELOCATE WATER METER
2" VALVE
75 LF 200 WATER LINE
2-45° BEND
CONTRACTOR TO FIELD LOCATE AND CONNECT TO EXIST. 2" WATER LINE
-WL4- DEFLECTION
BEGIN STA: 16+89.24
END STA: 17+87.48
BEND RADIUS: 764.0'
RECONNECT WATER METER
FIRE HYDRANT
6" VALVE
21 LF FIRE HYDRANT LEG
16"X16"X6" FH TEE
-WL4- STA. 15+69.25
AT&T TO INSTALL UG LINE
16"X16"X8" TEE
-WL4- STA. 19+03.94
16" VALVE
-WL4- STA. 19+33.55
2" BLOW OFF
-WL4- STA. 19+39.55
FOLLOW UC DETAIL 2B
3 LF 2" WATER LINE
2" VALVE
-WL4- STA. 19+36.55
16" PLUG W/ 2" TAP
-WL4- STA. 19+36.00
TIE-IN TO EXIST. 8" WATER LINE USING 8" SLEEVE
18 LF 8" WATER LINE
RJ DIP PC350
2-45° BEND (HORZ.)
8" PLUG ON EXISTING WATER LINE
RELOCATE WATER METER
6" PLUG W/ 2" TAP ON TEE
2" VALVE

THE ESTIMATED QUANTITY OF DUCTILE IRON WATER PIPE FITTINGS ON THIS PLAN SHEET IS 3980 POUNDS. THE ACTUAL QUANTITY AND TYPE OF FITTINGS WILL VARY BASED ON FIELD CONDITIONS.

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PRELIMINARY PLANS NOT FOR CONSTRUCTION
SEAL
SIGNATURE
DATE
SIG. INITIAL
INVENTORY NO. 10-06(11)

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-22
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
UTILITIES ENGINEERING SEC. PHONE:(919)707-6690 FAX:(919)250-4151	UTILITY CONSTRUCTION PLANS ONLY

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UTILITY CONSTRUCTION

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SCALE 1" = 50'
0 50 100 150 200

NAD 83/NA 2011

END TIP PROJECT U-4714AC
-L- POT STA. 193+50.61 LB=
BEGIN TIP PROJECT U-4714BA
-L- POT STA. 10+00.00 LA

ABANDON 821 LF 6" UTILITY PIPE
5223 LF TOTAL

ABANDON 229 LF 8" UTILITY PIPE

ABANDON 32 LF 8" UTILITY PIPE

76 LF WATER SERVICE LINE

18 LF WATER SERVICE LINE

54 LF WATER SERVICE LINE

32 LF WATER SERVICE LINE

24 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
RECONNECT CLEAN-OUT TO EXISTING SANITARY GRAVITY SEWER.

3-SANITARY SEWER CLEAN-OUT
RECONNECT CLEAN-OUT TO EXISTING SANITARY GRAVITY SEWER.

ADJUSTMENT OF MANHOLE

SANITARY SEWER CLEAN-OUT
37 LF 4" GRAVITY SANITARY SEWER

REMOVE UTILITY MANHOLE

CL-I RIP RAP
EST. 40 TONS
100 S.Y. GEOTEXTILE

72" CL-V RCP
BURIED W/CONC. SILL
SKEW=45
(DETAIL 4-3)

CL-B RIP RAP
EST. 2 TONS
7 S.Y. GEOTEXTILE

EST. 5 TONS
14 S.Y. GEOTEXTILE

CL-B RIP RAP
EST. 8 TONS
21 S.Y. GEOTEXTILE

CL-I OUTLET PROTECTION
EST. 55 TONS TOTAL
EST. 145 S.Y. GEOTEXTILE

SHENITA DEBERRY AND DANIEL DEBERRY
DB 3836 PG 464
PB A PG 50B
LOT 16

DAVID AARON FREED AND WIFE STEPHANIE FREED
DB 3744 PG 322
PB A PG 50B
LOT 15

FREDERICK M. BUNICK AND WIFE PATRICIA C. GABRIEL-BURNICK
DB 1639 PG 0293
PB A PG 50B
LOT 14

ERIK K. ROWLETT AND WIFE ISABEL RUEDA ABAD
DB 6005 PG 222

ROBERT M. SULLIVAN AND WIFE CARON L. SULLIVAN
DB 1653 PG 327

MARK DAVID BROOME
DB 7235 PG 204

SIKES VAN HENERY AND LYNETTE G
PB A PG 50B
LOT 10

LUKENS JUDY E
DB 6706 PG 257
PB A PG 50B
LOT 11

RUSSELL DANNY K AND VIRGINIA
DB N/F PG N/F
PB A PG 50B
LOT 12

PHIFER BRENDA E
DB N/F PG N/F
PB A PG 50B
LOT 13

STALLINGS POINTE LLC
DB 7094 PG 100

U-4714A DESIGN BY OTHERS

Piedmont Natural Gas Company Inc.

Wake Co. Public Works

DEPARTMENT OF TRANSPORTATION
DB 8501PG 0722

SANTONIOS K. PANOU
DB 9119PG 0

JAMES HAMILTON TURNER, JR.
DB 3524 PG 722

BRUCE R. MARX AND SPOUSE, LINDA L. MARX
DB 5944 PG 570

DAMON S. BUTCHER AND WIFE, TIFFANY M. BUTCHER
DB 1349 PG 699

EDWARD R. BENVENUTI, JR. & WIFE DIANA K. BENVENUTI
DB 5164 PG 730

JEAN ALEXANDER
DB 661I PG 385
PB 4 PG 189
LOT 1

ALEXANDER J. POLITES
DB 6781 PG 554
PB 7 PG 37A
LOT 6

TIMOTHY L. SHERIN AND WIFE DAWN M. SHERIN
DB 0516 PG 792
PB 7 PG 37A
LOT 5

DAWN M. SHERIN
DB 4555 PG 131
PB 7 PG 37A
LOT 4

317 PROPERTIES, LLC
DB 5887 PG 181
PB 7 PG 37A
LOT 3

POLE HELENA B.
DB N/F PG N/F
PB 7 PG 37A
LOT 2

JENNIFER J. DUNN II
DB 4142 PG 876
PB 7 PG 37A
LOT 1

BENJAMIN A. GUTHRIE AND SPOUSE, KATHRYN E. GUTHRIE
DB 6767 PG 593

LINA M. ALEXANDER
DB 1169 PG 823

WILLIAM LARRY ALEXANDER
DB 5771PG 446

HAZEL FOSTER
DB N/F PG N/F

SEE SHEET UC-4 FOR CORRESPONDING PROPOSED UTILITY NOTES

MATCHLINE - SEE SHEET UC-23

U:\Projects\4019628\4019628_0001\90_CAD Models and Sheets\04_CU_Utilities\Sheets\Abandon\BA\U-4714BA_UC_UC22.dgn
1/9/2026

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-23

DESIGNED BY:	TK
DRAWN BY:	TK
CHECKED BY:	RTK
APPROVED BY:	
REVISED:	

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NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

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MATCHLINE - SEE SHEET UC-22

MATCHLINE - SEE SHEET UC-24

ADJUSTMENT OF MANHOLE

ABANDON 111 LF 6" UTILITY PIPE

ABANDON 117 LF 6" UTILITY PIPE

REMOVE FIRE HYDRANT
CLOSE VALVE
REMOVE VALVE BOX

ABANDON 1200 LF 6" UTILITY PIPE
5223 LF TOTAL

8 LF WATER SERVICE LINE

99 LF WATER SERVICE LINE

9 LF WATER SERVICE LINE

13 LF WATER SERVICE LINE

41 LF WATER SERVICE LINE

ADJUSTMENT OF MANHOLE

ABANDON 121 LF 6" UTILITY PIPE

REMOVE FIRE HYDRANT
CLOSE VALVE
REMOVE VALVE BOX

ADJUSTMENT OF MANHOLE

ABANDON 108 LF 6" UTILITY PIPE

ABANDON 107 LF 4" UTILITY PIPE

CONTRACTOR TO FIELD LOCATE EXIST. 4" SANITARY SEWER (APPROX. LOCATION SHOWN)

SEE SHEET UC-5 FOR CORRESPONDING PROPOSED UTILITY NOTES

1/2/2026
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SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-24
DESIGNED BY: LTAW	
DRAWN BY: LTAW	
CHECKED BY: RTSK	
APPROVED BY:	
REVISED:	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
UTILITIES ENGINEERING SEC. PHONE:(919)707-6690 FAX:(919)250-4151	UTILITY CONSTRUCTION PLANS ONLY

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MATCHLINE - SEE SHEET UC-23

MATCHLINE - SEE SHEET UC-25

REMOVE FIRE HYDRANT

ABANDON 98 LF 2" UTILITY PIPE

120 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
28 LF 4" GRAVITY SANITARY SEWER

SANITARY SEWER CLEAN-OUT
31 LF 4" GRAVITY SANITARY SEWER

ADJUSTMENT OF MANHOLE

SANITARY SEWER CLEAN-OUT
15 LF 4" GRAVITY SANITARY SEWER

ABANDON 3401 LF 6" UTILITY PIPE
5223 LF TOTAL

ABANDON 303 LF 6" UTILITY PIPE

ADJUSTMENT OF MANHOLE

123 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
21 LF 4" GRAVITY SANITARY SEWER

SANITARY SEWER CLEAN-OUT
24 LF 4" GRAVITY SANITARY SEWER

126 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
31 LF 4" GRAVITY SANITARY SEWER

ADJUSTMENT OF MANHOLE

8 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
18 LF 4" GRAVITY SANITARY SEWER

SANITARY SEWER CLEAN-OUT
21 LF 4" GRAVITY SANITARY SEWER

ADJUSTMENT OF MANHOLE

ABANDON 176 LF 4" UTILITY PIPE

CONTRACTOR TO FIELD LOCATE EXIST. 4" SANITARY SEWER (APPROX. LOCATION SHOWN)

ABANDON 52 LF 8" UTILITY PIPE

129 LF WATER SERVICE LINE

ABANDON UTILITY MANHOLE

SANITARY SEWER CLEAN-OUT
37 LF 4" GRAVITY SANITARY SEWER

11 LF WATER SERVICE LINE

ABANDON 78 LF 8" UTILITY PIPE

SANITARY SEWER CLEAN-OUT
39 LF 4" GRAVITY SANITARY SEWER

PLUG AND ABANDON EXIST. SS LATERAL

SANITARY SEWER CLEAN-OUT
42 LF 4" GRAVITY SANITARY SEWER

11 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
45 LF 4" GRAVITY SANITARY SEWER

21 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
49 LF 4" GRAVITY SANITARY SEWER

SANITARY SEWER CLEAN-OUT
50 LF 4" GRAVITY SANITARY SEWER

10 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
52 LF 4" GRAVITY SANITARY SEWER

22 LF WATER SERVICE LINE

SEE SHEET UC-6 FOR CORRESPONDING PROPOSED UTILITY NOTES

1/9/2026
...ts\4019628\4019628.0001\90_CAD Models and Sheets\04_CU_Utilities\Sheets\Abandon\BA_U-4714BA_UC_UC24.dgn

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-25
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
UTILITIES ENGINEERING SEC. PHONE:(919)707-6690 FAX:(919)250-4151	UTILITY CONSTRUCTION PLANS ONLY

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION

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STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
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NC License Number F-0991

30 LF WATER SERVICE LINE

ABANDON 105 LF 2" UTILITY PIPE

ABANDON 17 LF 8" UTILITY PIPE

REMOVE UTILITY MANHOLE

ABANDON 39 LF 8" UTILITY PIPE

REMOVE FIRE HYDRANT

ABANDON 198 LF 8" UTILITY PIPE

SANITARY SEWER CLEAN-OUT
17 LF 4" GRAVITY SANITARY SEWER

SANITARY SEWER CLEAN-OUT
44 LF 4" GRAVITY SANITARY SEWER

REMOVE FIRE HYDRANT

SANITARY SEWER CLEAN-OUT
12 LF 4" GRAVITY SANITARY SEWER

ABANDON 1399 LF 6" UTILITY PIPE
5223 LF TOTAL

SANITARY SEWER CLEAN-OUT
12 LF 4" GRAVITY SANITARY SEWER

ADJUSTMENT OF MANHOLE

8 LF WATER SERVICE LINE

124 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
53 LF 4" GRAVITY SANITARY SEWER

ABANDON 85 LF 8" UTILITY PIPE

ABANDON 554 LF 8" UTILITY PIPE

SANITARY SEWER CLEAN-OUT
38 LF 4" GRAVITY SANITARY SEWER

ADJUSTMENT OF MANHOLE

ADJUSTMENT OF MANHOLE

SANITARY SEWER CLEAN-OUT
60 LF 4" GRAVITY SANITARY SEWER

5 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
70 LF 4" GRAVITY SANITARY SEWER

20 LF WATER SERVICE LINE

ABANDON 236 LF 8" UTILITY PIPE
426 LF TOTAL

ABANDON UTILITY MANHOLE

ABANDON 264 LF 8" UTILITY PIPE

71 LF WATER SERVICE LINE

136 LF WATER SERVICE LINE

54 LF WATER SERVICE LINE

ABANDON 324 LF 6" UTILITY PIPE

138 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
62 LF 4" GRAVITY SANITARY SEWER

244 LF WATER SERVICE LINE

SANITARY SEWER CLEAN-OUT
73 LF 4" GRAVITY SANITARY SEWER

ABANDON 271 LF 4" UTILITY PIPE

CONTRACTOR TO FIELD LOCATE EXIST. 4" SANITARY SEWER (APPROX. LOCATION SHOWN)

MATCHLINE - SEE SHEET UC-24

MATCHLINE - SEE SHEET UC-26

SEE SHEET UC-7 FOR CORRESPONDING PROPOSED UTILITY NOTES

1/9/2026
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SEE SHEET UC-8 FOR CORRESPONDING PROPOSED UTILITY NOTES

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

ABANDON UTILITY MANHOLE

SANITARY SEWER CLEAN-OUT
15 LF 4" GRAVITY SANITARY SEWER

ABANDON 329 LF 8" UTILITY PIPE

9 LF WATER SERVICE LINE

ABANDON 403 LF 6" UTILITY PIPE
5223 LF TOTAL

ABANDON UTILITY MANHOLE

ABANDON 191 LF 8" UTILITY PIPE
426 LF TOTAL

SANITARY SEWER CLEAN-OUT
53 LF 4" GRAVITY SANITARY SEWER

ADJUSTMENT OF MANHOLE

130 LF WATER SERVICE LINE

REPLACE CONC. CHANNEL
(SEE DETAIL 8-1)
EST. 4 C.Y. CONCRETE

ABANDON 180 LF 6" UTILITY PIPE

10 LF WATER SERVICE LINE

125 LF WATER SERVICE LINE
1" COPPER SERVICE

15 LF WATER SERVICE LINE
3/4" SERVICE

15 LF WATER SERVICE LINE
1" SERVICE

ABANDON 890 LF 8" UTILITY PIPE
2682 LF TOTAL

SANITARY SEWER CLEAN-OUT
81 LF 4" GRAVITY SANITARY SEWER

ADJUSTMENT OF MANHOLE

ABANDON 330 LF 8" UTILITY PIPE

116 LF WATER SERVICE LINE
3/4" SERVICE

SANITARY SEWER CLEAN-OUT
42 LF 4" GRAVITY SANITARY SEWER

95 LF WATER SERVICE LINE

112 LF WATER SERVICE LINE
1" COPPER SERVICE

4 LF WATER SERVICE LINE
3/4" SERVICE

176 LF 2" WATER SERVICE LINE
COPPER SERVICE

ABANDON 189 LF 8" UTILITY PIPE
395 LF TOTAL

SANITARY SEWER CLEAN-OUT
27 LF 4" GRAVITY SANITARY SEWER

RECONNECT WATER METER

117 LF 2" COPPER WATER SERVICE LINE

REMOVE UTILITY MANHOLE

MATCHLINE - SEE SHEET UC-25

MATCHLINE - SEE SHEET UC-27

MATCHLINE – SEE SHEET UC-38

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-26
DESIGNED BY: TK	
DRAWN BY: TK	
CHECKED BY: RTK	
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
Charlotte, NC 28203
NC License Number F-0991

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1/2/2026

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-27

DESIGNED BY: TK
DRAWN BY: TK
CHECKED BY: RTK
APPROVED BY:
REVISED:

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

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Charlotte, NC 28203
NC License Number F-0991

MATCHLINE - SEE SHEET UC-26

MATCHLINE - SEE SHEET UC-28

28 LF WATER SERVICE LINE

ABANDON 13 LF 6" UTILITY PIPE

ABANDON 57 LF 6" UTILITY PIPE

ABANDON 29 LF 6" UTILITY PIPE

9 LF 2" WATER SERVICE LINE

REMOVE FIRE HYDRANT

ABANDON 1400 LF 8" UTILITY PIPE
2682 LF TOTAL

229 LF WATER SERVICE LINE

7 LF 1" COPPER WATER SERVICE LINE

22 LF WATER SERVICE LINE

ABANDON UTILITY MANHOLE

ABANDON 398 LF 8" UTILITY PIPE

28 LF 4" GRAVITY SANITARY SEWER
RECONNECT SANITARY SEWER CLEAN-OUT

ABANDON UTILITY MANHOLE

SANITARY SEWER CLEAN-OUT
26 LF 4" GRAVITY SANITARY SEWER

134 LF WATER SERVICE LINE
1" COPPER SERVICE

ABANDON 395 LF 8" UTILITY PIPE
395 LF TOTAL

ABANDON 300 LF 8" UTILITY PIPE

20 LF WATER SERVICE LINE

2 - REMOVE FIRE HYDRANTS

2-SANITARY SEWER CLEAN-OUT
87 LF 6" GRAVITY SANITARY SEWER

2-REMOVE SANITARY CLEAN-OUT

ABANDON 230 LF 8" UTILITY PIPE
401 LF TOTAL

ABANDON UTILITY MANHOLE

ABANDON 264 LF 8" UTILITY PIPE

SEE SHEET UC-9 FOR CORRESPONDING PROPOSED UTILITY NOTES

SCALE 1" = 50'

0 50 100 150 200

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-28

DESIGNED BY: TK
DRAWN BY: TK
CHECKED BY: RTK
APPROVED BY:
REVISED:

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
Charlotte, NC 28203
NC License Number F-0991

NAD 83/NA 2011

MATCHLINE - SEE SHEET UC-27

MATCHLINE - SEE SHEET UC-29

ABANDON 231 LF 12" UTILITY PIPE

REMOVE FIRE HYDRANT
CLOSE VALVE
REMOVE VALVE BOX

ABANDON 392 LF 8" UTILITY PIPE
2682 LF TOTAL

ABANDON UTILITY MANHOLE

ABANDON 65 LF 8" UTILITY PIPE
APPROX. LENGTH. CONTRACTOR TO FIELD LOCATE

ABANDON UTILITY MANHOLE
APPROX. LOCATION. CONTRACTOR TO FIELD LOCATE

ABANDON 35 LF 8" UTILITY PIPE
APPROX. LENGTH. CONTRACTOR TO FIELD LOCATE

ABANDON UTILITY MANHOLE
APPROX. LOCATION. CONTRACTOR TO FIELD LOCATE

ABANDON 67 LF 8" UTILITY PIPE
APPROX. LENGTH. CONTRACTOR TO FIELD LOCATE

ABANDON 72 LF 8" UTILITY PIPE

ABANDON UTILITY MANHOLE

ABANDON 15 LF 8" UTILITY PIPE

ABANDON UTILITY MANHOLE

ABANDON 218 LF 8" UTILITY PIPE

ABANDON 171 LF 8" UTILITY PIPE
401 LF TOTAL

ABANDON 1165 LF 6" UTILITY PIPE
3258 LF TOTAL

BEGIN CONSTRUCTION -Y11- POT STA. 10+50.00

END TIP PROJECT U-4714BA
BEGIN FUTURE TIP PROJECT U-4714BB
-L- POT STA. 85+85.86 =
-LBA POT STA. 17+74.95

CL-B RIP RAP
EST. 5 TONS
14 S.Y. GEOTEXTILE

CL-B RIP RAP
EST. 8 TONS
21 S.Y. GEOTEXTILE

RAY B KILLOUGH
DB 5106 PG 656

DENISE KILLOUGH WINDHAM
BRIAN NEAL WINDHAM
DB 4031 PG 737

RALPH KILLOUGH
DB N/F PG N/F

RAY BERNARD KILLOUGH
DB 3646 PG 330
REFERENCE MADE TO THIS DEED BUT NO DESCRIPTION FOUND

LOT 1
E P CROWELL
N/F PG N/F
3 4 PG 149

CREEKSIDE BIBLE CHURCH
DB 5572 PG 280

KENNETH GANTZ
NO INFO FOUND

LOT 4
ROBERT E JOHNSON
SALLY H JOHNSON
DB 1105 PG 848
PB B PG 158-B

LOT 3
JERRY B HUNEYCUTT
PB B PG 158-B

LOT 2
AKN HOLDINGS LLC
PB B PG 158-B

SEE SHEET UC-10 FOR CORRESPONDING PROPOSED UTILITY NOTES

1/21/2026
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krantz

SCALE 1" = 50'

0 50 100 150 200

NAD 83/NA 2011

PROJECT REFERENCE NO.	SHEET NO.
U-4714B	UC-38

DESIGNED BY:	TK
DRAWN BY:	TK
CHECKED BY:	RTK
APPROVED BY:	
REVISED:	

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

UTILITIES ENGINEERING SEC.
PHONE:(919)707-6690
FAX:(919)250-4151

NORTH CAROLINA PROFESSIONAL SEAL 057622 ENGINEER ROBERT T KRANTZ

UTILITY CONSTRUCTION PLANS ONLY

UTILITY CONSTRUCTION

DOCUMENT NOT CONSIDERED FINAL UNLESS ALL SIGNATURES COMPLETED

STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
Charlotte, NC 28203
NC License Number F-0991

MATCHLINE - SEE SHEET UC-26

AT&T TO INSTALL UG LINE

5 LF WATER SERVICE LINE

10 LF WATER SERVICE LINE

71 LF WATER SERVICE LINE

77 LF WATER SERVICE LINE

ABANDON 55 LF 2" UTILITY PIPE

ABANDON 525 LF 6" UTILITY PIPE

REMOVE FIRE HYDRANT

93 LF 2" COPPER WATER SERVICE LINE

ABANDON 54 LF 8" UTILITY PIPE

ADJUSTMENT OF MANHOLE

65 LF WATER SERVICE LINE

END CONSTRUCTION -YIG- POT STA. 22+95.09

END GRADE -YIG- POT STA. 22+40.00

SEE SHEET UC-20 FOR CORRESPONDING PROPOSED UTILITY NOTES

1/2/2026
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North Carolina Department of Transportation
Preliminary Estimate

EXBIBIT B

U-4714BA UC AGREEMNET

Utility Construction Cost Estimate - 90%

County: Union
Route: U-4714BA
From:

Requested By: NCDOT
Prepared By: STV
Date: 2/12/2026

				Quantity		Total		
Item	**Type**	**Section No.**	**Description**	**Union County Betterment**	**NCDOT**	**Quantity**	**Units**	**Amount**
5325200000-E	U	1510	2" WATER LINE	26	446	472	LF	
5325800000-E	U	1510	8" WATER LINE	236	4,584	4,820	LF	
5326600000-E	U	1510	16" WATER LINE	8,707.0	0	8,707	LF	
5329000000-E	U	1510	DUCTILE IRON WATER PIPE FITTINGS	28830	15,755	44,585	LB	
5536000000-E	U	1515	2" VALVE	3	5	8	EA	
5546000000-E	U	1515	8" VALVE	1	16	17	EA	
5558600000-E	U	1515	16" VALVE	14.0	0	14	EA	
5606000000-E	U	1515	2" BLOW OFF	3	2	5	EA	
5666000000-N	U	1515	FIRE HYDRANT	1	18	19	EA	
5673000000-E	U	1515	FIRE HYDRANT LEG	8	285	293	LF	
5835700000-E	U	1540	16" ENCASEMENT PIPE	125	684	809	LF	
5836000000-E	U	1540	24" ENCASEMENT PIPE	494	0	494	LF	
5872500000-E	U	1550	BORE AND JACK OF 24"	160	0	160	LF	
5872500000-E	U	1550	BORE AND JACK OF 16"	65	227	292	LF	

Union County Construction Cost …….. …….. $ 3,213,000.00

NCDOT TIP Project: U-4714BA

Project Special Provisions

SR 1009 (Old Monroe Road) from West of Morningside Meadow Lane to East of SR 1377 (Wesley Chapel-Stouts Rd)
Utility Construction

Feb. 24, 2026

Prepared by:
Robert T. Krantz, PE
STV Engineers, Inc.
2151 Hawkins Street, Suite 1400
Charlotte, NC 28203

Signature and seal of professional engineer that prepared these special provisions



PROJECT SPECIAL PROVISIONS
UTILITY CONSTRUCTION

Revise the 2024 Standard Specifications as follows:

Page 15-1, Sub-article 1500-2 Cooperation with the Utility Owner, paragraph 2:

Add the following sentences:

The utility owner is Union County and the utilities are maintained by Union County Water. The contact person for Union County Water is Thomas Mann, PE; and he can be reached by phone at (704) 292-2560 or by email at thomas.mann@unioncountync.gov. The contractor is required to contact Thomas Mann at least two (2) weeks prior to the commencement of any water and/or sewer construction.

Prior to water and/or sewer construction, the contractor must submit to Thomas Mann of Union County Water, the proposed utility material submittals and shop drawings, as applicable for Union County review and obtain Union County approval of utility material submittals and shop drawings.

The contractor shall keep Union County's appointed representative informed of the work progress and provide opportunity for inspection of construction and testing. The contractor shall maintain water and sewer service to existing customers during construction, minimize the duration of any service disruption, and notify the Union County representative at least 72 hours in advance of any scheduled service disruption.

Testing, inspection, and acceptance of water and sewer utility shall be in accordance with NCDEQ and Union County requirements. Contractor shall coordinate with Union County to ensure all testing, inspection, and documentation requirements are met.

Unless otherwise indicated in these special provisions, all materials and requirements for proposed water and sewer lines shall at a minimum meet the standards and requirements outlined in the Union County Standard Specifications dated October 10, 2024 and Details dated September 13, 2024 (applicable details included in the plans). Any requirements not covered in the Union County standards shall meet the requirements of the 2024 NCDOT Standard Specifications.

Twelve Month Guarantee:

(A) The Contractor shall guarantee materials and workmanship against latent and patent defects arising from faulty materials, faulty workmanship or negligence for a period of twelve months following the date of final acceptance of the work for maintenance and shall replace such defective materials and workmanship without cost to the Department or Union County. The Contractor will not be responsible for damage due to faulty design, normal wear and tear, for negligence on the part of the Department or Union County, and/or for use in excess of the design.

(B) Where items of equipment or material carry a manufacturer's guarantee for any period in excess of twelve months, then the manufacturer's guarantee shall apply for that particular piece of equipment or material. Union County's first remedy shall be through the manufacturer although the Contractor is responsible for invoking the warranted repair work with the manufacturer. The Contractor's responsibility shall be limited to the term of the manufacturer's guarantee. Union County would be afforded the same warranty as provided by the Manufacturer.

This guarantee provision shall be invoked only for major components of work in which the Contractor would be wholly responsible for under the terms of the contract. Examples would include water and sewer pipe, valves, blow off assemblies, fire hydrants, and manholes. This provision will not be used as a mechanism to force the Contractor to return to the project to make repairs or perform additional work for which the Department or Union County would normally compensate the Contractor. In addition, routine maintenance activities (i.e. mowing grass, debris removal, ruts in earth shoulders,) are not parts of this guarantee.

Appropriate provisions of the payment and/or performance bonds shall cover this guarantee for the project.

Payment:

No direct payment will be made for utility construction work required by the preceding provisions, which are general requirements applying to utility construction, and all the requirements stated will be considered incidental work, paid at the contract unit prices of the various utility items included in this contract.

Measurement and payment for work will be in accordance with the *NCDOT Standard Specifications for Roads and Structures*, January 2024.

Page 15-5, Sub-article 1510-2 Materials, paragraph 1:

Add the following sentences:

Water line pipe from 6" through 12" diameter shall be Pressure Class 350 ductile iron pipe. 16" water line pipe shall be Pressure Class 250 ductile iron pipe. Follow Union County specifications and NCDOT Section 1036. In addition to allowable restraining systems for restrained-joint ductile iron pipe as provided in the Union County specifications, field-locking gaskets are allowable as a restraining device.

All 2" water line pipe shall be PVC 1120 SDR 21 in accordance with ASTM-D2241. Fittings for 2" PVC pipe shall be push-on joint PVC or threaded malleable iron.

All water service line ¾" thru 2" shall be Type "K" copper tubing with compression fittings. Splicing of copper service line of runs less than 100 feet will not be allowed. Provide and install a continuous segment of copper water service line between the corporation stop and water meter.

Ductile iron fittings shall have a cement mortar lining, and seal coated in accordance with ANSI/AWWA A21.4/C104.

Page 15-7, Sub-article 1510-3 Construction Methods, line 16:

Add the following sentences:

Samples for bacteriological testing will be collected by Union County personnel and tested at a laboratory under contract by Union County. Samples will typically be collected only on Wednesday mornings. Requests for sample collection must be made at least 48 hours in advance of the sample collection. Sample results will be available no sooner than 24 hours after the samples are delivered to the lab. There will be no cost to Contractor for sample testing for the first sample collected for each water line segment to be tested. Contractor will be responsible for costs related to re-testing for failing bacteriological samples at the prevailing rates of the testing laboratory. Price is subject to change. Union County will not accept test results from outside testing labs.

Page 15-9, Sub-article 1515-3 Construction Methods, line 14:

Add the following sentences:

Elevations of fire hydrants above finished grade to be within manufacturer's recommendation. Elevations of fire hydrants to be determined by Contractor. No separate payment will be made for fire hydrant extensions. The cost of fire hydrant extensions is to be included in the unit price for fire hydrants.

Page 15-9, Sub-article 1515-3 Construction Methods, line 30:

Add the following sentences:

2" blow offs include MJ plug to match the diameter of the water pipe as required, 2" brass nipple, 2" brass pipe, 2" 90-degree bend, 2" coupling, 2" gate valve when required, valve box, concrete ring, and thrust blocking or restraint as required.

Page 15-11, Sub-article 1520-2 Materials, paragraph 1:

Add the following sentences:

Gravity sewer pipe shall be SDR 26 PVC pipe or Pressure Class 350 ductile iron pipe. Pressure Class 350 ductile iron pipe shall be furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104.

All sewer lateral pipe shall be smooth-walled Schedule 40 PVC pipe in accordance with ASTMD1784, or Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104 when ferrous pipe is required due to proximity to other utilities.

SP-1 RELOCATE SEWER LATERAL CLEAN OUT TO NEW RIGHT-OF-WAY

Description:

Locate and remove existing sewer clean out and lateral pipe and install new clean out and lateral pipe.

Materials:

Refer to Division 10 and Union County Specifications.

Item	Section
Sanitary Sewer Pipe and Fittings	1034

Use any pipe specified under Section 1034 except where a particular type of pipe is specified in the plans or required by environmental regulations or Departmental or Union County policy.

Verify the pipe is appropriate for the test pressure of the system and the external loading.

For sewer services and laterals, use Schedule 40 PVC pipe or Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or equal, and seal coating in accordance with ANSI/AWWA A21.4/C104.

Construction Methods:

Locate existing sewer clean out at old roadway right-of-way line. Contact North Carolina 811 as needed to locate the existing sewer service line. Coordinate with sewer customer as needed to minimize disruption to service.

Apply Section 1505 for excavation, trenching, pipe laying and backfill to sanitary sewer installation. Perform all excavation to uncover existing clean out, wye, and sewer lateral. Saw-cut and remove wye and vertical clean out pipe. Remove existing lateral pipe between the existing clean out and proposed clean out at the right-of-way or easement line shown in the plans.

Install 4-inch minimum diameter sanitary sewer clean-out flush with finished grade on 4-inch and 6-inch service lines. Provide clean-outs at the right-of-way line and at changes in direction. Do not locate clean-outs within the roadway pavement or shoulders. Provide clean-outs no more than 50 feet apart when beyond the roadway shoulders. Provide and install Pressure Class 350 ductile iron pipe furnished with ceramic epoxy lining, Tnemec 431 or

equal, and seal coating in accordance with ANSI/AWWA A21.4/C104 when required due to proximity to other utilities.

Assemble pipe in accordance with the recommendations of the manufacturer. Connect pipe to the saw-cut end of the existing lateral pipe and extend new lateral pipe to the new clean out location.

Extend new pipe at the same slope as the existing sewer lateral pipe on the "sewer side" of the saw-cut. Differences in the elevations between the new lateral pipe and the existing private sewer lateral pipe at the right-of-way should be made up in the vertical clean out pipe using combination wyes as needed. Connect the existing sewer lateral pipe at the right-of-way to the new clean out. Provide sleeves or couplings as needed.

Measurement and Payment:

Relocate Sewer Lateral Clean Out to New Right-of-Way will be paid as the actual number of sewer clean outs relocated to the new right-of-way line, complete in place.

Materials used for clean outs and extension of sewer service lines for which there is a pay item will be paid under the specific pay item, including Sanitary Sewer Clean-Out and Sewer Service Line. No extra payment will be made for work included in other pay items. No separate payment will be made for explorations, PVC fittings, adapters, couplings, or construction equipment.

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

File #: 26-282 **Agenda Date:** 5/18/2026

TITLE:

Contract - Aeration Tank Cleaning

INFORMATION CONTACT:

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

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 Water owns and operates five Water Reclamation Facilities. As part of routine operations and maintenance of the facility, aeration tanks are put into and taken out of service for inspection, maintenance and operation. Over time debris such as rags, grit, sludge and other debris build up in the tanks and must be removed and disposed of offsite.

The Procurement Department partnered with Union County Water to issue Request for Proposals #2026-044 Aeration Tank Cleaning. On March 17, 2026, five proposals were received and reviewed by an evaluation team in accordance with applicable evaluation criteria for this project. As a result, the team requests approval to enter into a contract with the top scoring/ranked preferred offeror, Wind River Environmental, LLC, to provide Aeration Tank Cleaning services. This contract has a term of one year.

FINANCIAL IMPACT:

The anticipated cost for this service is $250,000. Sufficient funds were allocated in the FY26 Budget to cover costs associated with this agreement.

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 North Main Street, Monroe, NC 28112, hereinafter "Union," and WIND RIVER ENVIRONMENTAL, LLC, a Delaware corporation registered to do business in North Carolina, whose address is 131 Mariposa Road, Stanley, NC 28164, hereinafter "Contractor."

W I T N E S S E T H

WHEREAS, Union desires that Contractor perform certain aeration basin cleaning services; and

WHEREAS, Contractor is willing to perform such services as described in this Agreement.

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. SERVICES PERFORMED. Contractor agrees to perform the services as set forth in the attached Request for Proposals No. 2026-044, "Aeration Tank Cleaning," as modified by Addendum No. 1 dated February 2, 2026, Addendum No. 2 dated February 26, 2026, and Addendum No. 3 dated February 27, 2026 which are incorporated herein by reference (hereinafter the "Services"), in accordance with the terms of this Agreement.

2. FEE AND PAYMENT SCHEDULE. Union shall pay Contractor in accordance with the attached "Appendix A – Price Form" for performance of the Services. Contractor shall invoice Union on a monthly basis for Services performed, or upon such other schedule as may be agreed upon by the parties. Payment is due within thirty (30) days of receipt of an accurate invoice by Union's Finance Division. All payments shall be conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.

3. TERM AND TERMINATION. The Effective Date is the date of mutual execution of this Agreement. This Agreement shall have a term of one (1) year. Union may terminate this Agreement at any time, without cause, upon provision of ten (10) days' written notice to Contractor. In the event of termination without cause, Contractor shall be paid for services performed to the date of notification of termination by Union.

4. OWNERSHIP OF DOCUMENTS. All deliverables and any other contract documents prepared by Contractor, or any subcontractors or subconsultants under the terms of this Agreement ("the Documents"), shall be the property of Union. Contractor further acknowledges that Union is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act (the "Act"), and that this Agreement, as well as any of the Documents as defined herein, shall be a public record as defined in such Act, and as such, will be open to public disclosure and copying.

5. INSURANCE. The attached Exhibit A, Insurance Requirements, is incorporated herein by reference.

6. INDEMNIFICATION. Contractor agrees to protect, defend, indemnify and hold Union, 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 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.

7. DECLARATION BY CONTRACTOR. Contractor declares that Contractor has complied with all federal, state and local laws regarding the location and operation of Contractor's business and regarding business permits, certificates, and licenses that may be required to carry out the work to be performed under this Agreement.

8. FEDERAL, STATE, AND LOCAL TAXES. Neither federal, nor state, nor local income tax nor payroll tax of any kind shall be withheld or paid by Union on behalf of Contractor or the employees of Contractor. Contractor shall not be treated as an employee with respect to the services performed hereunder for federal or state tax purposes.

9. NOTICE TO CONTRACTOR REGARDING ITS TAX DUTIES AND LIABILITIES. Contractor understands that Contractor is responsible to pay, according to law, Contractor's income tax. If Contractor is not a corporation, Contractor further understands that Contractor may be liable for self-employment (social security) tax, to be paid by Contractor according to law.

10. FRINGE BENEFITS. Because Contractor is engaged in Contractor's own independently established business, Contractor is not eligible for, and shall not participate in, any employee pension, health or other fringe benefit plan of Union.

11. UNION NOT RESPONSIBLE FOR WORKERS' COMPENSATION. No workers' compensation insurance shall be obtained by Union concerning Contractor or the employees of Contractor. Contractor shall comply with the workers' compensation law concerning Contractor and the employees of Contractor.

12. NO AUTHORITY TO BIND UNION. Contractor has no authority to enter into contracts or agreements on behalf of Union. This Agreement does not create a partnership or any form of agency between the parties.

13. ASSIGNMENT. Neither Union nor Contractor shall assign, sublet or transfer any rights under or interest in this Agreement (including, but without limitation, monies that may become due or monies that are due) without the written consent of the other, except to the extent that any assignment, subletting or transfer is mandated by law or the effect of this limitation may be restricted by law. Unless specifically stated to the contrary in any written consent to assignment, no assignment shall release or discharge the assignor from any duty or responsibility under this Agreement.

14. NON-WAIVER. The failure of either party to exercise any of its rights under this agreement for a breach thereof shall not be deemed to be a waiver of such rights or a waiver of any subsequent breach.

15. HOW NOTICES SHALL BE GIVEN. Any notice given in connection with this agreement shall be given in writing and shall be delivered either by hand to the party or by certified mail, return receipt requested, to the party at the party's address stated herein. Any party may change its address stated herein by giving notice of the change in accordance with this paragraph.

16. APPLICABLE LAW AND JURISDICTION. 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.

17. COMPLETE AGREEMENT. This Agreement contains the complete agreement of the parties regarding the terms and conditions of the Agreement, and there are no oral or written conditions, terms, warranties, understandings or other agreements pertaining thereto which have not been incorporated herein. This Agreement may be modified only by written instrument duly executed by both parties, or their respective successors in interest.

18. SEVERABILITY. The provisions hereof are severable, and should any provision be determined to be invalid, unlawful or otherwise null and void by any court of competent jurisdiction, the other provisions shall remain in full force and effect and shall not thereby be affected unless such ruling shall make further performance hereunder impossible or impose an unconscionable burden upon one of the parties.

19. AUTHORITY. Each party warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Agreement. Each party 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.

20. 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. Contractor shall ensure that Contractor 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. A breach of this provision by Contractor will be considered a breach of this Agreement, which entitles Union to terminate this Agreement, without penalty, upon notice to Contractor.

[*Signatures follow on the next page.*]

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

UNION COUNTY

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

WIND RIVER ENVIRONMENTAL, LLC

By: _____ (SEAL)

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 CGR

Exhibit A
Insurance Requirements

I. BASIC INSURANCE REQUIREMENTS. 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 all 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. COMMERCIAL AUTOMOBILE LIABILITY

$1,000,000	Combined Single Limit - Any Auto

D. POLLUTION LIABILITY INSURANCE

$1,000,000	Claims Made

Contractor shall provide evidence of continuation or renewal of Pollution Liability Insurance for a period of two (2) years following termination of the Agreement.

II. ADDITIONAL INSURANCE REQUIREMENTS.

A. The 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 RESPECT TO THE GENERAL LIABILITY INSURANCE POLICY.

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 County'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. Union, 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: Water
Contract #: 10293

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.

Request for Proposals No. 2026-044
Aeration Tank Cleaning

Due Date:	March 17, 2026
Time:	11:00 AM EST
Receipt Location:	Electronic Submission (Refer to Section 2) Union County Procurement and Contract Management Department (Note: Follow the submittal instructions in Section 2.2 to electronically upload a proposal package.)

Non-Mandatory Pre-Proposal Conference and Site Visit. February 18, 2026. For the time and location, Refer to page 3 for details.

Procurement Contact:

Juan Rodriguez-Cruz
Procurement Specialist
704.283.3519
Juan.Rodriguez-Cruz@unioncountync.gov

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1 NOTICE OF ADVERTISEMENT

Union County, North Carolina
Request for Proposals No. 2026-044
Aeration Tank Cleaning

Electronic proposals will be received by the Union County's Procurement Department via electronic portal only, until **11:00 AM EST on March 17, 2026.** Late submittals will not be accepted.

Union County, North Carolina, through Union County Water, is soliciting proposals from experienced and qualified firms to provide Aeration Tank Cleaning Services.

Copies of the solicitation may be obtained from the locations listed below:

1. Download the Proposal Documents from the Union County website: https://www.unioncountync.gov/departments/bids-procurement/current-bids

2. Download the Solicitation Documents from the State of North Carolina Electronic Vendor Portal: https://evp.nc.gov (Search County of Union – Filter Solicitation Status Open).

A Non-Mandatory Pre-proposal and Site Visit Meeting: This is a non-mandatory meeting that will take place on **February 18, 2026 at 10:00 AM** at the Twelve Mile Creek WRF, 8299 Kensington Dr. Waxhaw NC 28173. Representatives from Union County Water will be on-hand to give a brief overview of the project and to answer questions. Attendance at this meeting is strongly encouraged.

All questions about the meaning or intent of the Proposal Documents are to be submitted in writing to the Procurement contact person listed on the cover page (Juan.Rodriguez-Cruz@unioncountync.gov). The deadline for questions is on **February 25, at 5:00 PM EST.**

Union County reserves the right to reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest.

Union County reserves the right to award to multiple vendors.

Offerors are required to comply with the non-collusion requirements set forth in the Solicitation Documents.

Union County encourages good faith effort outreach to Minority Businesses (HUB Certified) and Small Businesses.

2 SUBMITTAL DETAILS

2.1 PROPOSAL SUBMISSION DEADLINE AND DELIVERY ADDRESS

All Proposal Submittals are to be received by the Union County Procurement Department no later than **11:00 AM EST on March 17, 2026,** per the instructions below. Any submittals received after this date and time shall be rejected without exception.

2.2 PROPOSAL SUBMISSION REQUIREMENTS

The proposal must be submitted electronically using the following link: https://lfportal.unioncountync.gov/Forms/procurementsubmit. Select the Solicitation drop down arrow and choose this RFP from the list. Complete the form, upload your proposal, and select submit. An email will be sent to the address listed on the form as your confirmation of receipt.

The proposal package **must be signed** by a person who is authorized to bind the proposing Company. Instructions for preparing the proposal are provided herein.

Paper submissions will not be accepted.
Submissions e-mailed directly to the Procurement Contact will not be accepted.

There is no expressed or implied obligation for Union County to reimburse Offerors for any expenses incurred in preparing proposals in response to this request.

Union County reserves the right to:

- Reject any or all proposals, to waive technicalities and to make such selection deemed in its best interest;
- Cancel this solicitation; and
- Award to multiple vendors.

2.3 PRE-PROPOSAL CONFERENCE AND SITE VISIT

A Non-Mandatory Pre-Proposal Conference will be held on **February 18, at 10:00 AM** at the Twelve Mile Creek WRF, 8299 Kensington Dr. Waxhaw NC 28173. Union County Water staff and a Union County Procurement representative will be present to give a brief overview of the project and give access to the facility.

2.4 PROPOSAL QUESTIONS

Proposal questions will be due on or before **February 25, 2026 at 5:00 PM EST**. The primary purpose is to provide participating Offerors with the opportunity to ask questions, in writing, related to the RFP.

Submit questions in a Word Document or in the body of an email and send to Juan Rodriguez-Cruz Juan.Rodriguez-Cruz@unioncountync.gov by the deadline shown above. **The email subject line should identify the proposal number and project title**. All questions and answers may be posted as addenda on www.unioncountync.gov and/or https://evp.nc.gov

2.5 PROPOSAL ADDENDUM

Union County may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum.

Should an Offeror find discrepancies or omissions in this RFP or any other documents provided by Union County, the Offeror should immediately notify the County of such potential discrepancy in writing via email as noted above.

Any addenda to these documents shall be issued in writing. No oral statements, explanations, or commitments by anyone shall be of effect unless incorporated in the written addenda. Receipt of Addenda shall be acknowledged by the Offeror on Appendix C – Addendum and Anti-Collusion form.

2.6 COMMUNICATION

All communications, any modifications, clarifications, amendments, questions, responses or any other matters related to this Request for Proposals must be made only through the Procurement Contact noted on the cover of this RFP. A violation of this provision is cause for the County to reject a Company's proposal. No contact regarding this document with other County employees is permitted and may be grounds for disqualification.

3 PURPOSE

3.1 COUNTY

The County (estimated population 239,859) is located in the central, southern piedmont. The County provides its citizens with a full array of services that include public safety, water/wastewater utilities and sanitation, human services, cultural and recreational activities, and general government administration.

3.2 INTRODUCTION

Union County (hereafter the "County"), through Union County Water, is soliciting proposals from qualified contractors for aeration tank cleaning services.

4 SCOPE OF SERVICES

4.1 SCOPE OF WORK SUMMARY

Union County Water desires to have all rags, grit, sludge and debris removed and disposed of from one aeration basin at its Twelve Mile Creek WRF located at 8299 Kensington Dr Waxhaw NC 28173. Contractor shall furnish all permits, labor, materials and equipment required to remove, transport, and dispose of materials removed from the aeration tank. Contractor shall perform all services in strict accordance with all Applicable Law. Within twenty-four (24) hours of occurrence, Contractor shall provide UCPW with written notice of violation or noncompliance with respect to Contractor's permit(s), UCPW's permit(s), or of any action commenced in any court of competent jurisdiction involving the operations conducted by Contractor during the duration of this contract.

Contractor shall coordinate scheduling with plant operations staff. The Twelve Mile Creek WRF is currently under construction. Contractor activities shall be coordinated so as not to interfere with ongoing construction operations. Union County will coordinate work in construction areas to satisfy the operational needs of both contractors and the County. All work must be scheduled in advance, and Contractor shall provide daily status updates to Union County regarding work performed, planned activities, and any issues encountered.

If a dewatering or decanting operation will be part of the process, coordinate these activities with the Union County Water and Wastewater point of contact to determine where the water will be disposed of and if at the plant, sampling may be conducted. Metering of the water back into the plant to prevent a plant upset will be required.

Dewatering Performance Requirements:

Dewatering operations shall meet the following minimum performance criteria:

- Cake solids shall be greater than 15 percent (15%).
- Filtrate or centrate solids shall be less than 200 mg/L.
- Ammonia shall be less than 75 mg/L.
- Total phosphorus shall be less than 15 mg/L.

Sampling will be performed randomly by Union County Water Plant Operations staff. All samples will be analyzed on-site by Union County. Results shall be used to verify compliance with performance requirements.

Utilities and Power: Union County will provide water for mobile press units as required. Contractor shall be responsible for supplying and operating a generator to provide power for all mobile press units and associated equipment.

Union County Water Plant Operations reserve the right to halt, suspend, or modify any cleaning, dewatering, or related activities at any time and for any reason, including but not limited to operational needs, safety concerns, regulatory requirements, enforcement of blackout periods, or coordination with other on-site activities. The Contractor shall immediately comply with any such direction from Union County Water staff.

Work to be completed Monday through Friday 7am-5pm.

Blackout Periods:

No work shall be performed during the following blackout periods:

- January 26, 2026 through February 6, 2026
- April 27, 2026 through May 8, 2026
- July 27, 2026 through August 7, 2026
- October 26, 2026 through November 6, 2026

If the project duration extends beyond these dates, additional blackout periods may be identified by Union County and incorporated as needed. No work shall be performed on weekends or on Union County–recognized holidays.

Approximate area of debris 240'L X 58'W X 1' H

4.2 SAFETY

The Offeror shall provide all employees with necessary personal protective equipment such as industry specific clothing, head, respiratory, eye, hand and foot protection.

4.3 SPECIAL REQUIREMENTS

- Ongoing Regulatory Compliance: Contractor must possess and maintain all appropriate permits, plans, equipment, facilities, and personnel necessary to safely accept, transport and deliver County bio-solids in a manner consistent with all applicable state federal and local requirements. Contractor must appropriately document bio-solids transport as required by law and must produce such records as requested by the County.
- Operations in good standing: Contractor shall have in effect no current enforcement actions against their operations pertaining to bio-solids transport. Contractor shall maintain a satisfactory safety record for the duration of this contract. This includes but is not limited to notices of violation, orders, penalties, or other enforcement actions restricting relevant activities.
- Adequate hauling equipment: All equipment supplied and/or utilized under this contract must be of adequate design and condition to safely, satisfactorily, and legally accept, transport, and transfer bio-solids as required. A minimum 3,000-gallon tanker equipped to load and discharge by on-board pump shall be required. Tanker shall be free of contaminants that could cause harm to the receiving WRF.
- Spill response capabilities: Contractor must operate all equipment utilized under this contract in such manner as to prevent spillage during transport. However, in case of unavoidable spills, Contractor must promptly and adequately respond to spills in such a manner as to maintain regulatory compliance and minimize harm to the affected environment, people and equipment. Contractor must immediately report any spill incidents to the County and other appropriate parties, per spill response plans.
- Stormwater Protection and Spill Prevention: Contractor shall install and maintain stormwater pollution prevention measures sufficient to prevent, contain, and control spills or releases associated with the work. Contractor shall maintain an appropriate spill kit on site at all times. A stormwater map is provided as an attachment to this RFP for informational purposes.
- Chemical Use and Safety Data Sheets: Contractor shall submit Safety Data Sheets (SDS) for all chemicals proposed for use to the Plant Supervisor and obtain written approval from the Plant Supervisor prior to bringing or using any chemicals on site.

5 DETAILED SUBMITTAL REQUIREMENTS AND INSTRUCTIONS

5.1 TERMS OF SUBMISSION

All material received from a person or company ("Offeror") in response to this solicitation shall become the property of Union County and will not be returned to the Offeror. Any and all costs incurred by an Offeror in preparing, submitting, or presenting submissions are the Offeror's sole responsibility and Union County shall not reimburse the Offeror. All responses to this solicitation will be considered a public record and subject to disclosure under applicable public records law.

Any material in a response which the Offeror considers a trade secret and exempt from disclosure as a public record under applicable law, including N.C.G.S. §§ 132-1.2 and 66-152, must be properly designated as a trade secret. In order to properly designate such material, the Offeror must: (i) submit any trade secret materials in a separate envelope, or file, from all other submitted material, being clearly marked as "Trade Secret – Confidential and Proprietary Information," and (ii) stamp the same trade secret/confidentiality designation on each page of the materials therein which contain trade secrets.

To the extent consistent with public records law, Union County will make reasonable efforts to maintain the confidential nature of trade secrets, as determined by Union County and subject to the conditions set forth herein. Offeror understands and agrees by submitting a response to this solicitation, that if a request is made to review or produce a copy of any information in the Offeror materials which was properly labeled by the Offeror as a trade secret, Union County will notify the Offeror of the request and the date that such materials will be released to the requestor unless the Offeror obtains a court order enjoining that disclosure. If the Offeror fails to obtain the court order enjoining disclosure prior to that date, Offeror understands and agrees that Union County will release the requested information to the requestor on that date.

Furthermore, the Offeror also agrees to indemnify and hold harmless Union County and each of its officers, employees, and agents from all costs, damages, and expenses incurred in connection with refusing to disclose any material that has been designated as a trade secret by Offeror.

5.2 DUPLICATE PROPOSALS

No more than one (1) proposal from any Offeror will be considered by the County. In the event multiple proposals are submitted in violation of this provision, the County will have the right to determine which proposal will be considered, or at its sole option, reject all such multiple proposals.

5.3 PROPOSAL FORMAT

The County desires all responses to be identical in format in order to facilitate comparison. While the County's format may represent a departure from the vendor's preference, the County requests adherence to the format. All responses are to be in the format described below.

Offerors should prepare their proposals in accordance with the instructions outlined in this section. Each Offeror is required to submit the proposal electronically – Refer to page 4, item 2.2. Each section should be identified as described below. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP.

The County may award a contract based on initial offers received without discussion of such offers. A proposer's initial offer should, therefore, be based on the most favorable terms available. The County reserves the right to contact proposers regarding cost and scope clarification at any time throughout the selection process.

The successful Offeror's proposal must include all responses to the requirements contained within this RFP and all appendices (if applicable) must be completed in their entirety.
By submitting a proposal, the successful Offeror's Offeror agrees to all applicable provisions, terms and conditions associated with this RFP. This solicitation, the successful Offeror's submitted proposal, all appendices and attachments (if applicable), and stated terms and conditions may become part of the resulting contract.

Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, or tables should be numbered and clearly labeled. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

Omissions and incomplete answers may be deemed unresponsive. Please initial any corrections.

The proposal should be organized and identified by section as follows:

- **Section A** – Cover Letter
- **Section B** – Company Background and Experience
- **Section C** – Project Team
- **Section D** – Methodology and Implementation Plan
- **Section E** - References
- **Section F** – Proposed Pricing
  - Appendix A – Price Form (completed); submit with proposal
- **Section G** – Required Forms
  - Appendix B – Proposal Submission (signed)
  - Appendix C - Addenda Receipt and Anti-Collusion (signed)

5.3.1 SECTION A – COVER LETTER

Provide the following information about your company. Respond to each item and provide supporting documentation and/or exhibits as requested or desired.

1. Legal Company Name and DBA (if applicable)
   Address
   Telephone Number
   Website Address
   Name of Single Point of Contact
   Title
   Telephone Number
   Email Address

2. Name of Person with Binding Authority
   Title
   Address
   Telephone Number
   Email Address

3. Stipulate that the proposal price will be valid for a period of 180 days.

4. Make the following representations and warranty in the cover letter, the falsity of which might result in rejection of its proposal: "The information contained in this proposal or any part thereof, including any exhibits, schedules, and other documents and instruments delivered or to be delivered to the County, is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead the County as to any material facts."

5.3.2 SECTION B – COMPANY BACKGROUND AND EXPERIENCE

This section provides each vendor with the opportunity of demonstrating how its history, organization, and partnerships differentiate it from other entities. Careful attention should be paid to providing information relevant to Union County needs.

Provide a concise profile of the Proposer's organization to include the following:

- Corporate history, and number of years in business under the current organizational name, structure and services offered.
- Assets available to meet County service requirements.
- Is the Offeror's organization involved in any pending litigation that may affect its ability to provide its products and services?

5.3.3 SECTION C – PROJECT TEAM

Describe the professional staff to be associated with this project. Upon award and during the contract period, if the contractor chooses to assign different personnel to the project, the Contractor must submit their names and qualifications including information listed above to the County for approval before they begin work. At a

minimum, this section should include the following information for each key person identified by the company:

- Name and title
- Project responsibilities and roles
- Involvement levels & durations
- Years of relevant experience
- Length of service with the company

5.3.4 SECTION D - METHODOLOGY AND IMPLEMETATION PLAN

Provide a description of the approach and methodology to be used to accomplish the Scope of Work of this RFP. The Methodology Section should include:

- An implementation plan that describes the methods, including controls, by which your firm manages projects of the type.
- Project management, implementation strategies or techniques that the Offeror intends to use in carrying out the work.
- Brief description of efforts your firm will undertake to achieve client satisfaction and to satisfy the requirements of this solicitation.
- Brief description of specific tasks you will require from County staff. Explain what the respective roles of County staff and your staff would be to complete the tasks specified.

5.3.5 SECTION F – REFERENCES

- Provide, at a minimum, three (3) comparable clients with whom your firm has an established relationship similar to the Scope of Work outlined in this RFP and include the following:
- Company Name
- Contact Name and Title
- Address
- Phone Number
- Email Address
- Project name
- Length of Relationship

5.3.6 SECTION G – PRICE FORM

Complete Appendix A – Price Form and submit with proposal.

5.3.7 SECTION H – REQUIRED FORMS

Offerors must include signed copies of the following documents:

- Appendix B – Proposal Submission (signed)
- Appendix C – Addenda Receipt and Anti-Collusion (signed)

6 EVALUATION CRITERIA AND SELECTION PROCESS

6.1 SELECTION PARTICIPANTS

1. Maintaining the integrity of the RFP process is of paramount importance for the County. To this end, please do not contact any members of Union County or its staff regarding the subject matter of this RFP until a selection has been made, other than the County's designated contact person identified in the introduction to this RFP.

2. Representatives of Union County will read, review, and evaluate the RFP independently based on the evaluation criteria. Failure to abide by this requirement shall be grounds for disqualification from this selection process.

3. The County will establish an RFP Evaluation Team to review and evaluate the RFPs. The RFP Evaluation Team will assess the RFPs independently in accordance with the published evaluation criteria. Union County reserves the right to conduct interviews with a shortlist of selected Offerors.

4. At its sole discretion, the Owner may ask written questions of Offerors, seek written clarification, and conduct discussions with Offerors on the RFPs.

   The County reserves the right to determine the suitability of proposals on the basis of a proposal meeting scope and submittal criteria listed in the RFP. Evaluation criteria and other relevant RFP information will be used to assist in determining the finalist Vendor.

6.2 FINANCIAL INFORMATION

Offeror may be asked to provide the following financial information. If the following financial information is requested, it shall be readily available and provided to the County within forty-eight (48) hours upon request during the bid certification process:

1. Annual audited financial reports for the past five (5) fiscal years;
2. Credit reports, credit bulletins, bank and vendor references, and any other published statements by agencies that have been issued or published about the entity within the past five (5) years;
3. Indicate whether the Company (and/or predecessor, guarantor, or subcontractor) has declared bankruptcy within the last five (5) years;
4. Provide a description of the financial impact of any past or pending legal proceedings and judgments that could materially affect the Offeror's financial position or ability to provide service to the County.

6.3 EVALUATION SELECTION PROCESS

A weighted analysis of the evaluation criteria will be utilized to determine the Vendor that represents the best value solution for the County.

In the evaluation and scoring/ranking of Offerors, the County will consider the information submitted in the RFP as well as the meetings (if applicable) with respect to the evaluation criteria set forth in the RFP.

The initial evaluation criteria/factors and relative weights listed below will be used to recommend selection of the Proposed Offeror or for the purpose of selecting Short-Listed Offerors. The County may choose to award without engaging in interview discussions.

RFP Criteria	Weights
Company Background and Experience	40%
Project Team, Methodology & Implementation Plan	35%
Price	15%
Compliance with Submittal Requirements	10%

Vendors may be invited to give a demonstration of the capabilities of the proposed solution to the Union County evaluation team. The successful bidder's demonstration (if requested), along with questions and answers, will be a critical component of the overall vendor evaluation.

After identification of Short-Listed Offerors, the County may or may not decide to invite Short-Listed Offerors to vendor demonstration/interviews. If interviews are scheduled with the Short-Listed Offerors, previous evaluation and rankings are not carried forward. For the purpose of selecting a Preferred Offeror, the evaluation criteria will be given the following relative weights:

Interview Criteria	Weights
Proposed Approach & Staff	60%
Price, Quality and Relevance of Interview as it Relates to the Scope of the RFP	40%

Additional meetings may be held to clarify issues or to address comments, as deemed appropriate. Proposers will be notified in advance of the time and format of such meetings.

6.4 AWARD PROCEDURE

Union County has the right to reject any or all proposals, to engage in further negotiations with any Company submitting a proposal, and/or to request additional information or clarification. The County is not obligated to accept the lowest cost proposal. The County may accept the proposal that best serves its needs, as determined by County officials in their sole discretion.

The County reserves the right to make an award without further discussion of the proposals received. Therefore, it is important that the proposal be submitted initially on the most favorable terms.

A proposal may be rejected if it is incomplete. Union County may reject any or all proposals and may waive any immaterial deviation in a proposal.

More than one proposal from an individual, Offeror, partnership, corporation or association under the same or different names, will not be considered.

The County reserves the right to enter into negotiations with the top ranked Offeror. However, negotiations with the top ranked Offeror does not signify a commitment by Union County to execute a contract or to continue discussions.

The County reserves the right to terminate negotiations at any time and for any reason. The County may select and enter into negotiations with the next most advantageous Proposer if negotiations with the initially chosen Proposer are not successful.

The award shall be made in the best interest of the County. This Request for Proposal is not subject to any competitive bidding requirements of North Carolina law. The County reserves the right to accept other than the most financially advantageous proposal.

The award document will be a Contract incorporating, by reference, all the requirements, terms and conditions of the solicitation and the Offeror's proposal as negotiated.

6.5 CONFLICT CERTIFICATION

The Offeror must certify that it does not have any actual or potential conflicts of interest with, or adversarial litigation against the County or any of its officers or employees. During the course of the contractual relationship formed pursuant to this solicitation, any such conflict of interest, whether newly arising or newly discovered, must be disclosed to the County in writing.

7 GENERAL CONDITIONS AND REQUIREMENTS

7.1 TERMS AND CONDITIONS

Union County has the right to reject any or all proposals, to engage in further negotiations with any Company submitting a proposal, and/or to request additional information or clarification. The County is not obligated to accept the lowest cost proposal. The County may accept that proposal that best serves its needs, as determined by County officials in their sole discretion.

All payroll taxes, liability and worker's compensation are the sole responsibility of the Offeror. The Offeror understands that an employer/employee relationship does not exist under this contract.

All proposals submitted in response to this request shall become the property of Union County and as such, may be subject to public review.

7.2 CONTRACTUAL OBLIGATIONS

The contents of this Proposal and the commitments set forth in the selected Proposal(s) shall be considered contractual obligations, if a contract ensues. Failure to accept these obligations may result in cancellation of the award. All legally required terms and conditions shall be incorporated into final contract agreements with the selected Service Provider(s).

7.3 SUB-CONTRACTOR/PARTNER DISCLOSURE

If the proposal by any Company requires the use of sub-contractors, partners, and/or third-party products or services, this must be clearly stated in the proposal. The Company submitting the proposal shall remain solely responsible for the performance of all work, including work that is done by sub-contractors.

7.4 EXCEPTION TO THE PROPOSAL

An “exception” is defined as the Service Provider’s inability or unwillingness to meet a term, condition, specification, or requirement in the manner specified in the Proposal. All exceptions taken must be identified and explained in writing in the proposal and must specifically reference the relevant section(s) of this Proposal. Other than exceptions that are stated in compliance with this Section, each proposal shall be deemed to agree to comply with all terms, conditions, specifications, and requirements of this Proposal. If the Service Provider provides an alternate solution when taking an exception to a requirement, the benefits of this alternate solution and impact, if any, on any part of the remainder of the Service Provider’s solution, must be described in detail.

7.5 MODIFICATION OR WITHDRAWAL OF PROPOSAL

Prior to the scheduled closing time for receiving proposals, any Vendor may withdraw their proposal. After the scheduled closing time for receiving proposals, no proposal may be withdrawn for 180 days. Only written requests for the modification or correction of a previously submitted proposal that are addressed in the same manner as proposals and are received by the County prior to the closing time for receiving proposals will be accepted. The proposal will be corrected in accordance with such written requests, provided that any such written request is in a sealed envelope that is plainly marked “Modification of Proposal” – with solicitation number and name on the front of the envelope. Oral, telephone, or fax modifications or corrections will not be recognized or considered.

7.6 EQUAL EMPLOYMENT OPPORTUNITY

All Offerors will be required to follow Federal Equal Employment Opportunity (EEO) policies. Union County will affirmatively assure that on any project constructed pursuant to this advertisement, equal employment opportunity will be offered to all persons without regard to race, color, creed, religion, national origin, sex, and marital status, status with regard to public assistance, membership or activity in a local commission, disability, sexual orientation, or age.

7.7 MINORITY BUSINESSES OR DISADVANTAGED BUSINESSES

It is the policy of Union County that Minority Businesses (MBEs), Disadvantaged Business Enterprises (DBEs) and other small businesses shall have the opportunity to compete fairly in contracts financed in whole or in part with public funds. Consistent with this policy, Union County will not allow any person or business to be excluded from participation in, denied the benefits of, or otherwise be discriminated against in connection with the award and performance of any contract because of sex, race, religion, or national origin.

7.8 LICENSES

The successful Offeror(s) shall have and maintain a valid and appropriate business license (if applicable), meet all local, state, and federal codes, and have current all required local, state, and federal licenses.

7.9 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. Vendor/Offeror shall ensure that Offeror and any Sub-Contractor performing work under this contract: (i) uses E-Verify if required to do so; and (ii) otherwise complies with applicable law.

7.10 DRUG-FREE WORKPLACE

During the performance of this Request, the Offeror agrees to provide a drug-free workplace for their employees; post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the workplace and specify the actions that will be taken against employees for violations of such prohibition; and state in all solicitations or advertisements for employees placed by or on behalf of the Offeror that the Offeror maintains a drug-free workplace.

For the purposes of this section, “drug-free workplace” means a site for the performance of work done in connection with a specific contract awarded to a Offeror/Offerors in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Request.

7.11 INSURANCE

One or more of the following insurance limits may be required if it is applicable to the project. The County reserves the right to require additional insurance depending on the nature of the agreement.

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
(for any agreement unless otherwise waived by the Risk Manager)
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. COMMERCIAL AUTOMOBILE LIABILITY
(for any agreement involving the use of a contractor vehicle while conducting services associated with the agreement)

$1,000,000 Combined Single Limit - Any Auto

D. PROFESSIONAL LIABILITY
(only for any agreement providing professional service such as engineering, architecture, surveying, consulting services, etc.)

$1,000,000 Claims Made

E. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)
(for any agreement involving software applications)

$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. The 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.

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 County's Risk Manager at 500 N. Main Street # 130, Monroe, NC 28112, within two (2) days of the cancellation or substantive change of any insurance policy set out herein. Union, 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: _____
Contract #: _____

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: Union County Risk Manager
500 N. Main Street, Suite #130
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.

7.12 INDEMNIFICATION

Contractor agrees to protect, defend, indemnify and hold Union County, 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.

8 APPENDIX A – PRICE FORM

RFP 2026-044 Aeration Tank Cleaning
Submit with Proposal

Company Name _____

DESCRIPTION	MOBILIZATION	DEMOBILIZATION	PRICE PER WET TON	ESTIMATED VOLUME TO BE REMOVED (WET TONS)	ESTIMATED TOTAL PRICE
Refer to section 4. Scope of Services					$

Note: The estimated volume to be removed and the estimated total price are provided for budgeting and comparison purposes only. Actual quantities will be determined during performance of the work. Evaluation of pricing will be based primarily on mobilization costs, demobilization costs, and the price per wet ton.

9 APPENDIX B – PROPOSAL SUBMISSION

RFP 2026-044 Aeration Tank Cleaning

Submit with Proposal

This Proposal is submitted by:

Company Legal Name: _____

Representative Name: _____

Representative Signature: _____

Representative Title: _____

Address: _____

County/State/Zip: _____

Email Address: _____

Phone Number: _____

Website Address: _____

It is understood that Union County reserves the right to reject any and all proposals, to make awards according to the best interest of the County, to waive formalities, technicalities, to recover and re-advertise this project. Proposal is valid for 180 days. Proposal is submitted by an executive of the company that has authority to contract with Union County, NC.

Name: _____

Title: _____

Required Signature: _____

Date: _____

10 APPENDIX C – ADDENDUM AND ANTI-COLLUSION

RFP 2026-044 Aeration Tank Cleaning

Submit with Proposal

Please acknowledge receipt of all addenda by including this form with your Proposal. Any questions or changes received will be posted as an addendum on unioncountync.gov and/or https://evp.nc.gov. It is your responsibility to check for this information.

Addendum No.	Date Downloaded

I certify that this proposal is made in good faith and without collusion with any other offeror or officer or employee of Union County.

Company Name: _____

Name: _____

Title: _____

Email Address: _____

Signature: _____

Date: _____

11 APPENDIX D – AERATION TANK DRAWINGS

RFP 2026-044 Aeration Tank Cleaning

Informational Purposes Only - Do not submit with proposal.

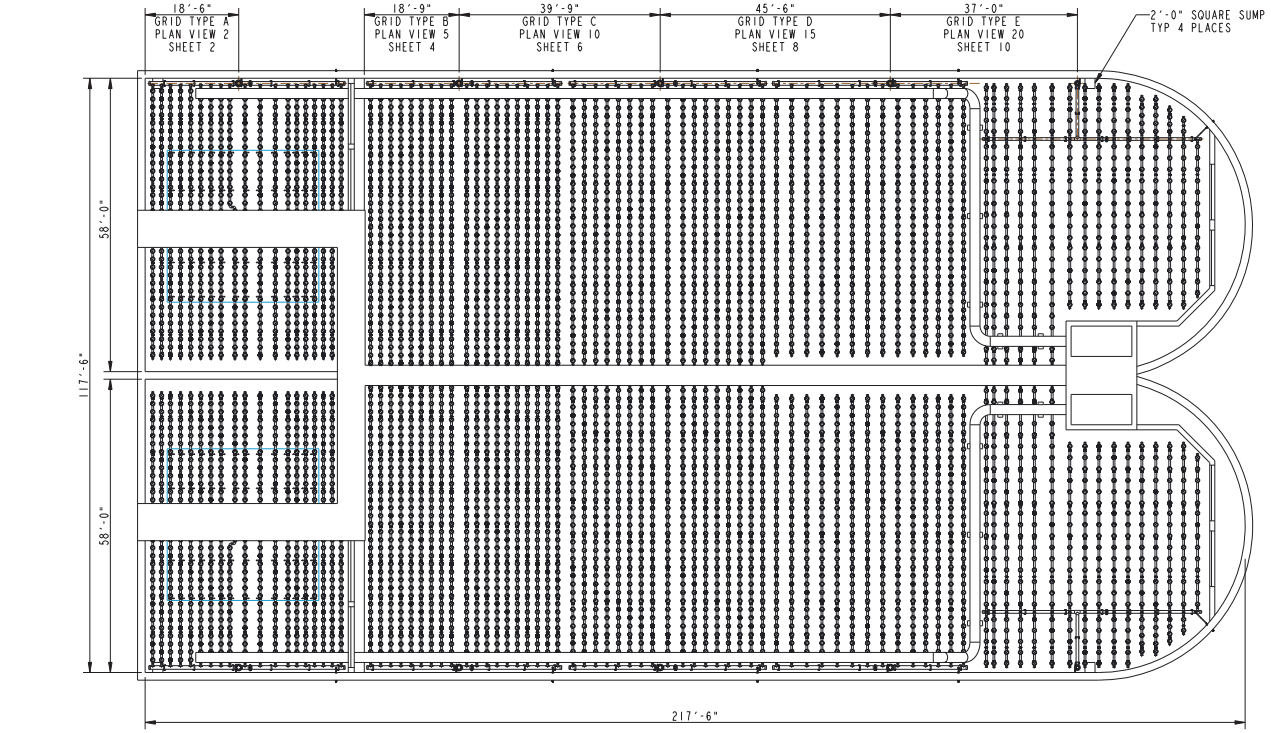
Request for Proposals No. 2026-044
Aeration Tank Cleaning

Due Date:	March 10, 2026
Time:	11:00 AM EST
Receipt Location:	Electronic Submission (Refer to Section 2) Union County Procurement and Contract Management Department (Note: Follow the submittal instructions in Section 2.2 to electronically upload a proposal package.)

Non-Mandatory Pre-Proposal Conference and Site Visit. February 11, 2026. For the time and location, Refer to page 3 for details.

Procurement Contact:

Juan Rodriguez-Cruz
Procurement Specialist
704.283.3519
Juan.Rodriguez-Cruz@unioncountync.gov



08/31/15	MEMBRANE DISC AERATION SYSTEM MATERIAL AND MANUFACTURING SPECIFICATIONS (304L, PVC)		
ITEM	MATERIAL SPECIFICATION	MANUFACTURING SPECIFICATION	NOTES
DROPLEG	304L STAINLESS STEEL ASTM A240	FITTINGS: ASTM A774 TUBULAR PRODUCTS: ASTM A778 DIMENSIONS: ASTM A554	*304 DRILLING FOR TERMINATION FLANGE CONNECTION. SCHEDULE 5S OR 80S WALL THICKNESS OR DROPLEG. *SEE BELOW
SUPPORTS	304L STAINLESS STEEL SHEET & PLATE PER ASTM A240 THREADED ROD PER ASTM A276	———	"L" GRADE NOT REQUIRED FOR NON-WELDED PARTS
BOLTS, NUTS, WASHERS	18-8 STAINLESS STEEL	———	———
FIXED JOINT O-RING	NATURAL RUBBER/SBR	———	45±5 DUROMETER SHORE A COMPRESSION SET 35 MAX
MANIFOLD & LOWER DROPLEG	PVC, ASTM D1784 COMPOUND 12454-B	PIPE: ASTM D1785 FITTINGS: ASTM D2466	———
MANIFOLD & AIR DISTRIBUTORS	PVC, ASTM D3915 COMPOUND 12452	PIPE: ASTM D3034 FITTINGS: ASTM D3034	MINIMUM 2% TITANIUM DIOXIDE
DIFFUSER HOLDER SUBPLATE, RETAINING RING	PVC, ASTM D3915 COMPOUND 12452	———	MINIMUM 2% TITANIUM DIOXIDE
DIFFUSER ELEMENT	EPDM	———	———
PVC SOLVENT WELDING	ASTM D2564	ASTM D2855	———

*STAINLESS STEEL DROPLEG FABRICATION
FACTORY WELD ONLY WITH MIG, TIG, OR PLASMA-ARC WELDING INERT GAS PROCESSES, FULL PENETRATION BUTT WELDS, ER 316L FILLER WIRE. AFTER FABRICATION FINISH CLEAN ALL WELDED STAINLESS STEEL ASSEMBLIES BY FULL IMMERSION CLEANING TECHNIQUES IN ACCORDANCE TO 6.2.11 OF ASTM A380-86. THE ACID FOR USE DEFINED BY TABLE A2.1 OF ANNEX A2 OF ASTM A380. FINAL RINSE AND DRY IN ACCORDANCE TO SECTION 8.3 OF ASTM A380. ALL WELDED SURFACES TO CONFORM TO AISI NO. 2D FINISH.

XX
X
VIEW, SECTION, OR DETAIL NUMBER
SHEET NUMBER ON WHICH VIEW, SECTION, OR DETAIL IS FOUND

KEY PLAN (1)

TANKS 1 AND 2 AS SHOWN
TANKS 5 AND 6 IDENTICAL

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

FOR RECORD ONLY. EQUIPMENT SHOWN HAS BEEN RELEASED FOR FABRICATION.
xylem
03/21/17

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS

REV	DATE	REVISION	BY
2	03/21/17	CHANGES PER JON S. REV SHEET DATED 03/14/17	TJC
1	02/23/17	CHANGES PER JON S. REV SHEET DATED 02/20/17	TJC

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

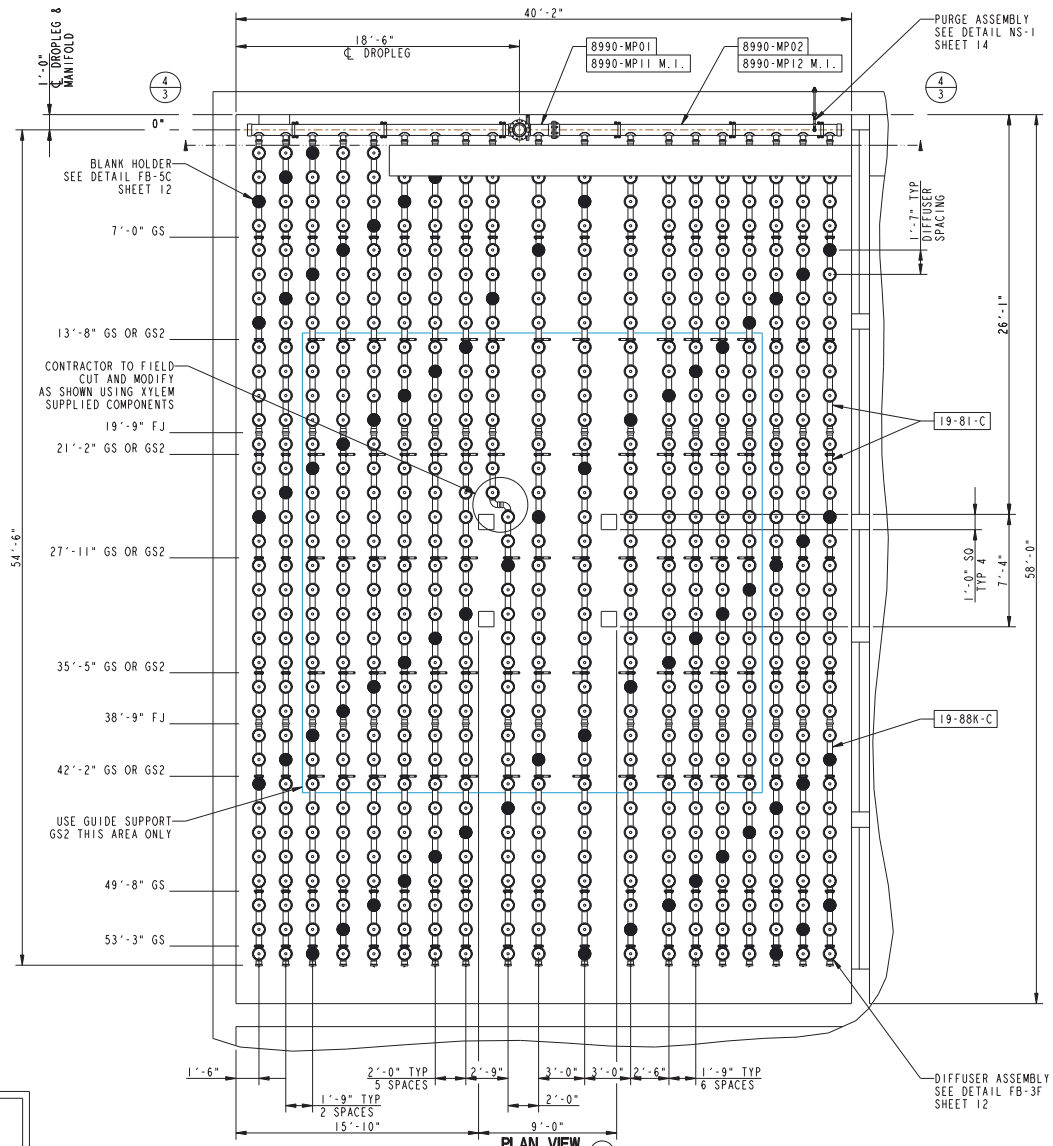
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KEY PLAN

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY	TJC	DATE 01/06/17	DISAP.
CHKD BY	JS	DATE 02/01/17	WTR.
APPVD BY	JS	DATE 02/01/17	SIZE D REV. B

JOB NO. 16-8990S
DRWG NO. E-1
SHEET 1 OF 14



PLAN VIEW (2)

GRID TYPE A
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE A
4-TANK(S)
1-GRID(S) PER TANK
19-AIR DISTRIBUTORS PER GRID
34-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
646-DIFFUSER HOLDERS PER GRID
575-DIFFUSER ELEMENTS INSTALLED PER GRID
2300-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
71-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-2
SHEET-13

GS2 - GUIDE SUPPORT
SEE DETAIL SUP-2A
SHEET-13

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

FOR GS & GS2		
TANK	SUPPORT	STRUT
1 & 2	2354-3SP	1878-48
5 & 6	2354-2SP	1878-46

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS

REV	DATE	REVISION	BY

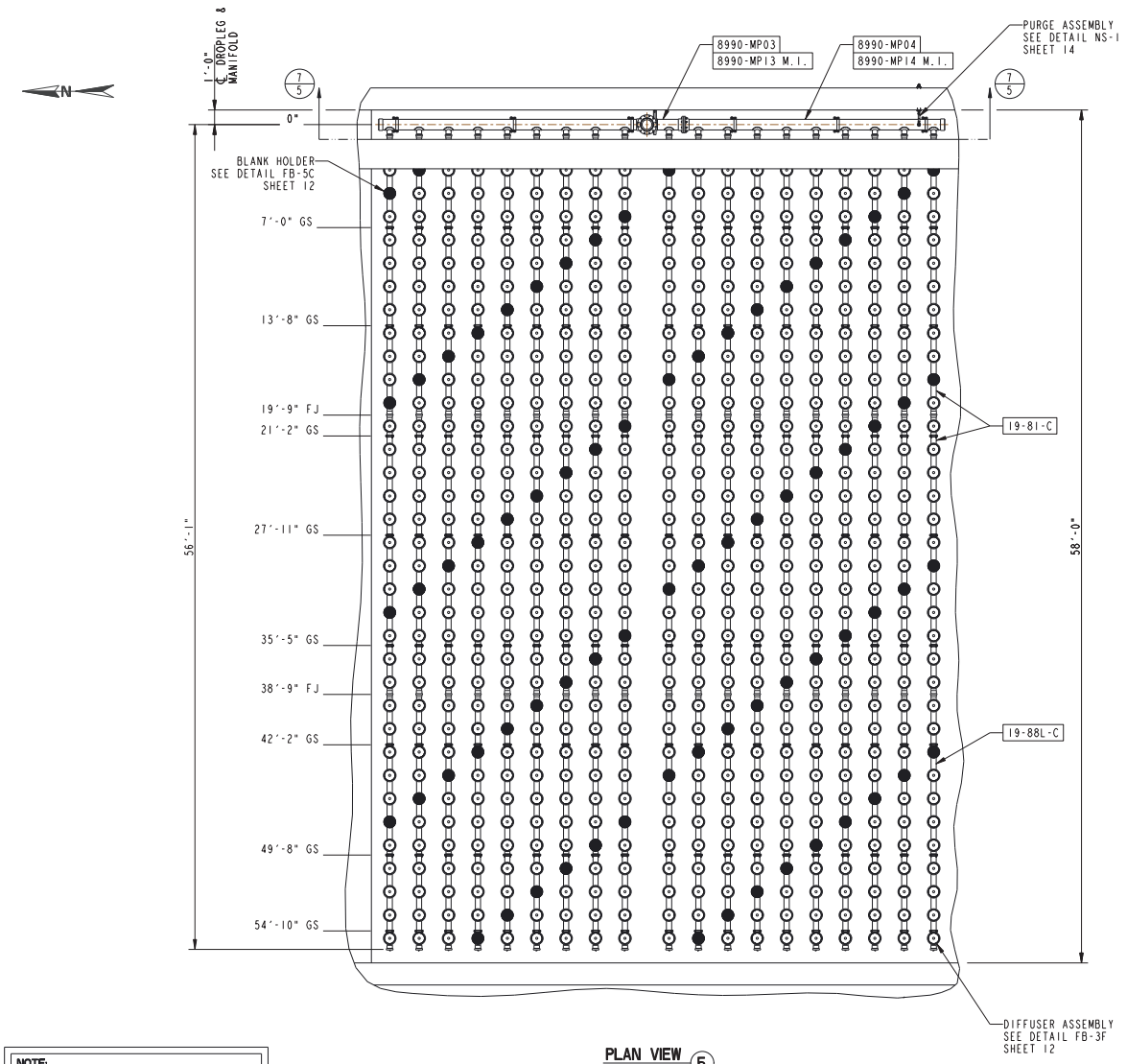
UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

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PLAN VIEW
GRID TYPE A

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY TJC	DATE 01/06/17	SHEET	
CHKD BY JS	DATE 02/01/17	JOB NO. 16-8990S	SHEET 2 OF 14
APPVD BY JS	DATE 02/01/17	SIZE D REV. B	DWG NO. E-2



PLAN VIEW (5)

GRID TYPE B
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE B
4-TANK(S)
1-GRID(S) PER TANK
19-AIR DISTRIBUTORS PER GRID
35-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
665-DIFFUSER HOLDERS PER GRID
588-DIFFUSER ELEMENTS INSTALLED PER GRID
2352-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
77-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-1
SHEET-13

FOR GS	
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

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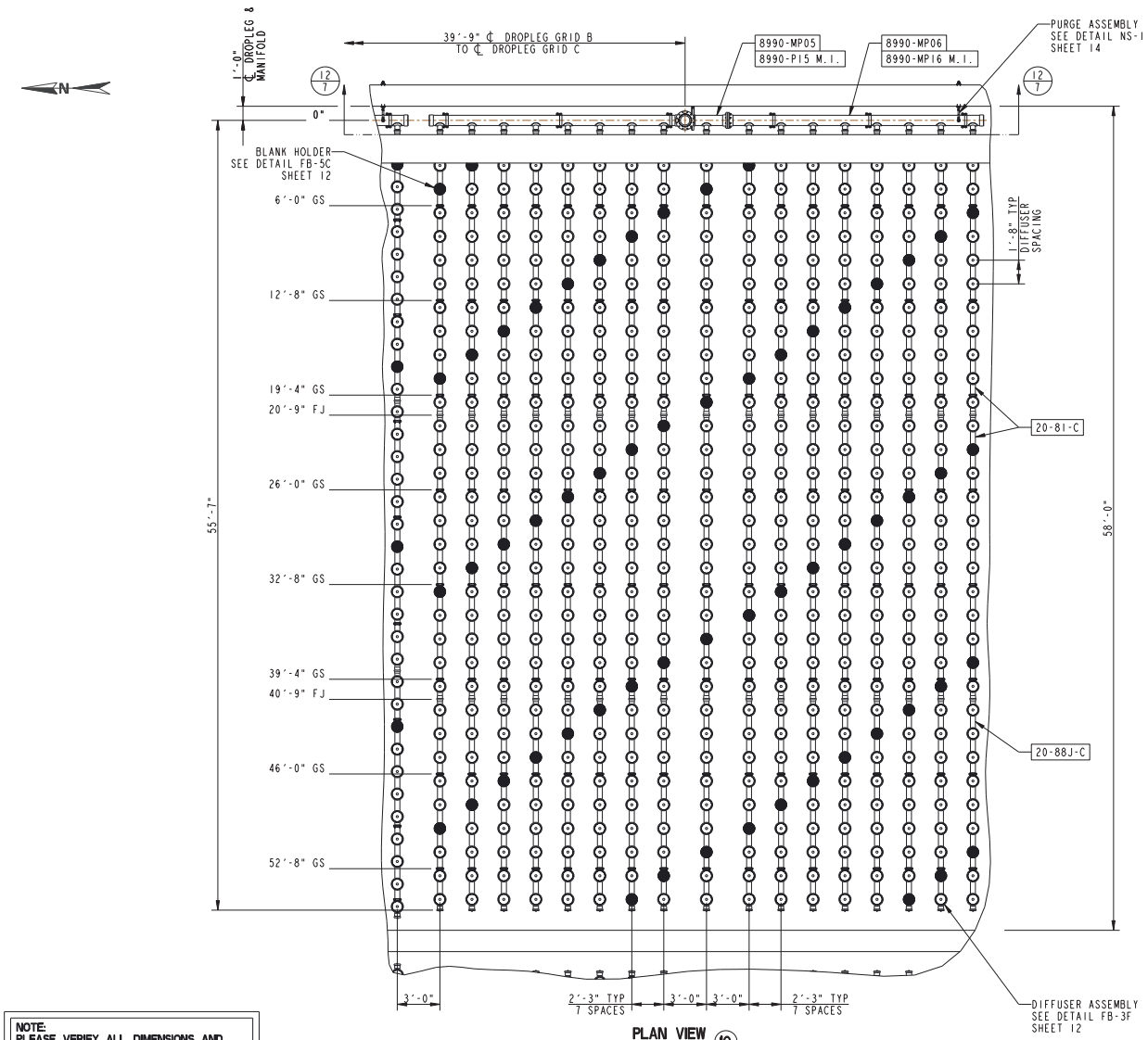
FOR APPROVAL ONLY.
NOT FOR CONSTRUCTION.
xylem
03/21/17

PLAN VIEW
GRID TYPE B

WARNING
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SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY	TJC DATE 01/06/17	SHOP	
CHKD BY	JS DATE 02/01/17	SITE	
APPVD BY	JS DATE 02/01/17	SIZE D REV. B	JOB NO. 16-8990S
		DRWG NO. E-4	SHEET 4 OF 14



PLAN VIEW (10)

GRID TYPE C
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE C
4-TANK(S)
1-GRID(S) PER TANK
17-AIR DISTRIBUTORS PER GRID
33-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
561-DIFFUSER HOLDERS PER GRID
499-DIFFUSER ELEMENTS INSTALLED PER GRID
1996-TOTAL DIFFUSER ELEMENTS INSTALLED FOR THIS GRID TYPE
62-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT SEE DETAIL FB-10A SHEET-12

GS - GUIDE SUPPORT SEE DETAIL SUP-1 SHEET-13

FOR GS	
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION SEE DETAIL FB-22K SHEET-12

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

WARNING
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REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

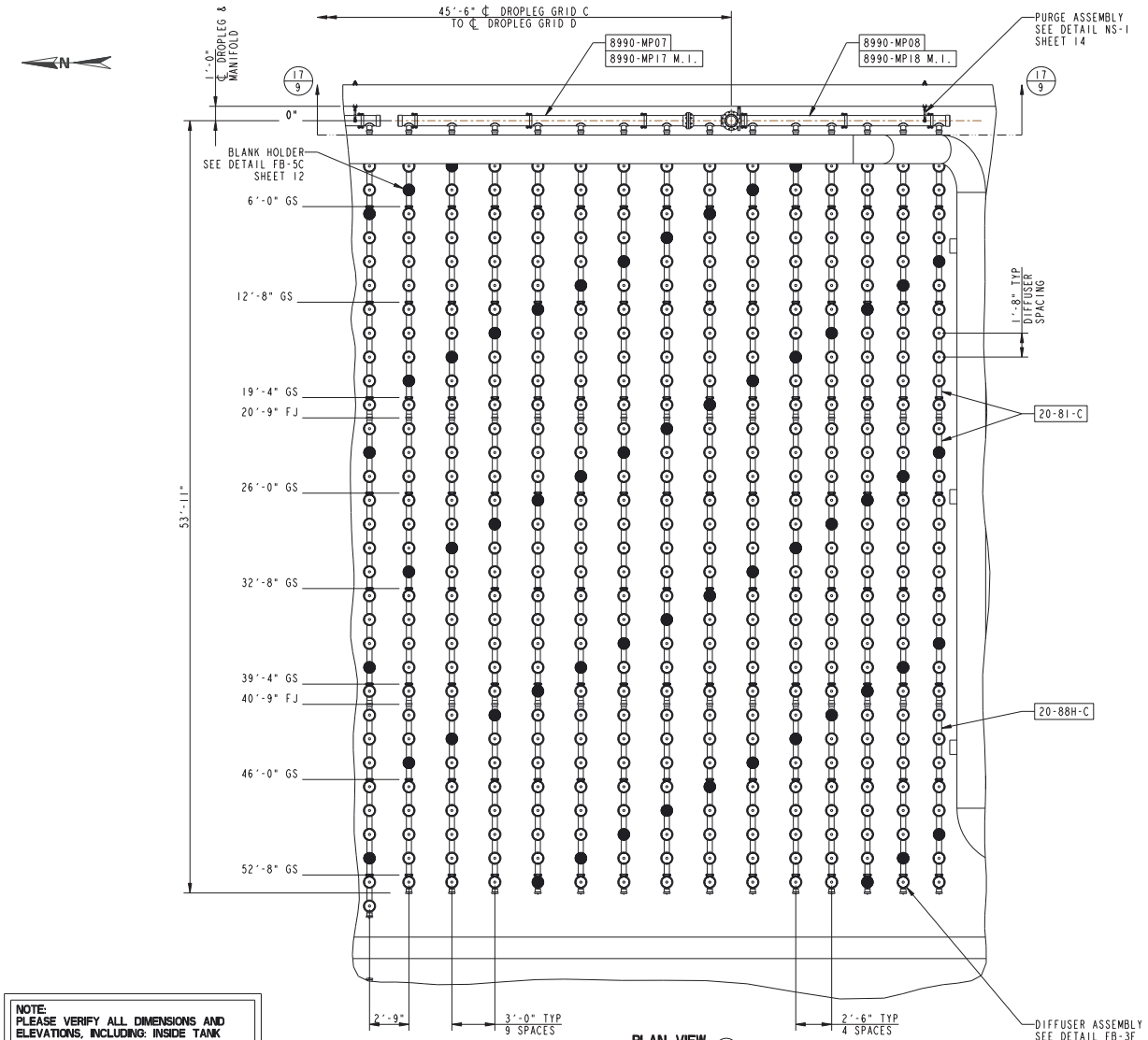
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PLAN VIEW
GRID TYPE C

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY	TJC	DATE 01/06/17	DSGN	JOB NO.	16-8990S
CHKD BY	JS	DATE 02/01/17	DTL		
APPVD BY	JS	DATE 02/01/17	SIZE D REV. B	DRWG NO.	E-6

SHEET 6 OF 14



PLAN VIEW (15)

GRID TYPE D
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE D
4-TANK(S)
1-GRID(S) PER TANK
14-AIR DISTRIBUTORS PER GRID
32-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
448-DIFFUSER HOLDERS PER GRID
392-DIFFUSER ELEMENTS INSTALLED PER GRID
1568-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
56-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-1
SHEET-13

FOR GS	
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

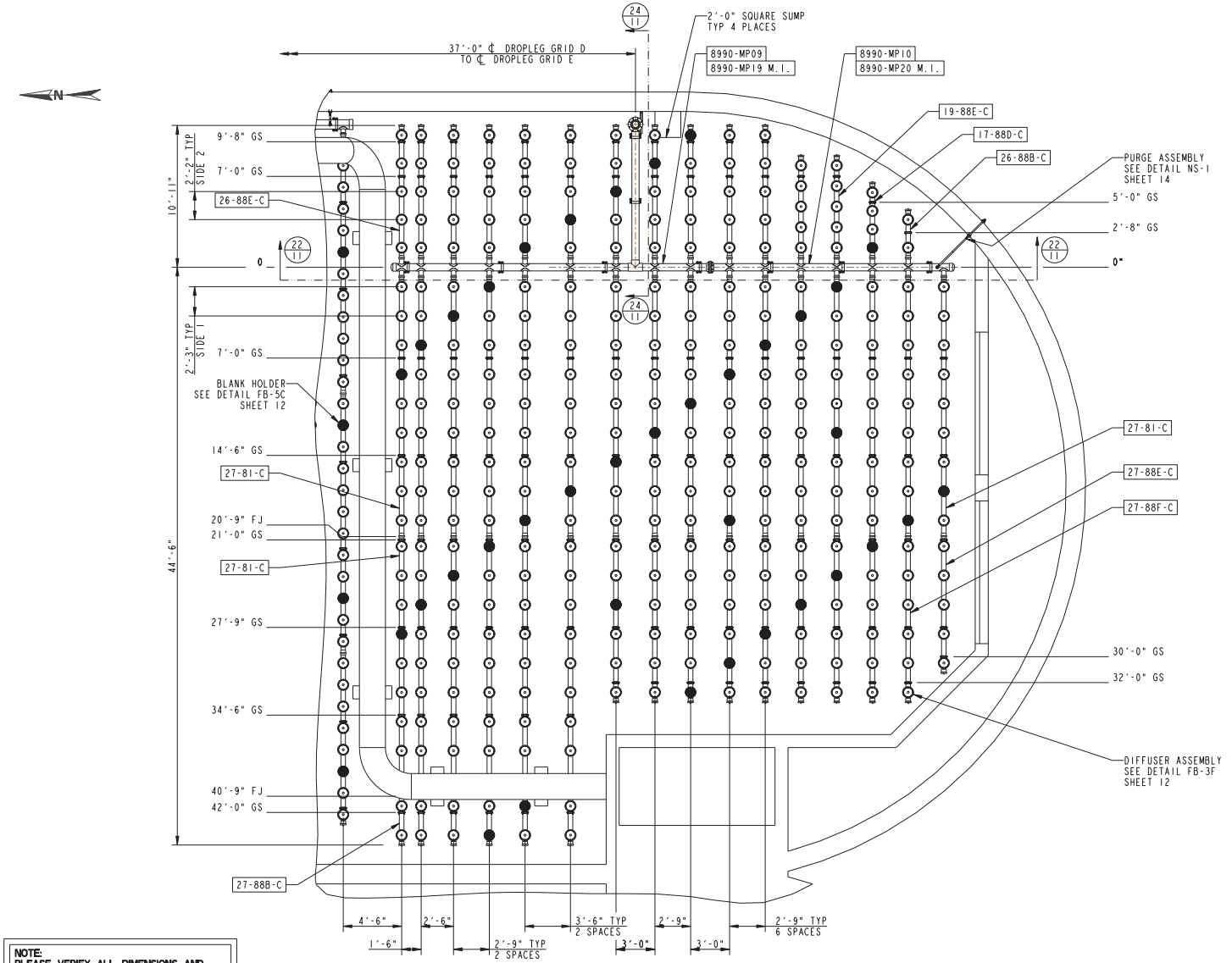
THIS DRAWING IS THE PROPERTY OF XYLEM AND IS SUBMITTED IN CONFIDENCE. IT IS NOT TO BE DISCLOSED, USED OR DUPLICATED WITHOUT PERMISSION OF XYLEM.

PLAN VIEW
GRID TYPE D

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY TJC DATE 01/06/17	DISCIP.	JOB NO. 16-8990S	SHEET 8 OF 14
CHKD BY JS DATE 02/01/17	STTL		
APPVD BY JS DATE 02/01/17	SIZE D REV. B	DRWG NO. E-8	

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS



PLAN VIEW (20)

GRID TYPE E
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE E
4-TANK(S)
1-GRID(S) PER TANK
16-AIR DISTRIBUTORS PER GRID
VARIES-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
340-DIFFUSER HOLDERS PER GRID
303-DIFFUSER ELEMENTS INSTALLED PER GRID
1212-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
37-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-1
SHEET-13

FOR GS	
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

THIS DRAWING IS THE PROPERTY OF XYLEM AND IS SUBMITTED IN CONFIDENCE. IT IS NOT TO BE DISCLOSED, USED OR DUPLICATED WITHOUT PERMISSION OF XYLEM.

PLAN VIEW
GRID TYPE E

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY	TJC	DATE 01/06/17	DSGN	JOB NO.	16-8990S
CHKD BY	JS	DATE 02/01/17	DTL		
APPVD BY	JS	DATE 02/01/17	SIZE D REV. B	DRWG NO.	E-10

SHEET 10 OF 14

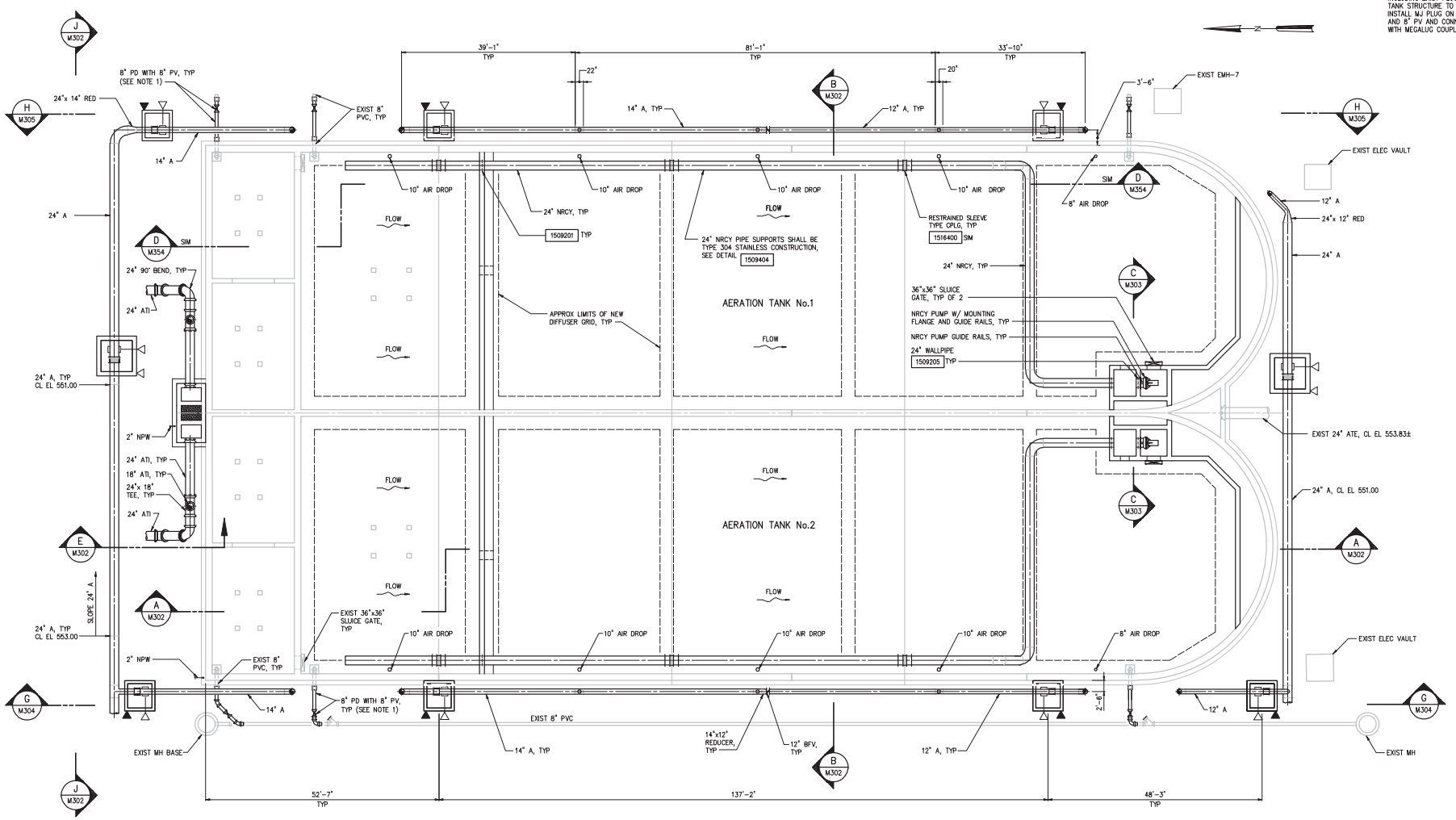
LEGEND

▲ DENOTES FIXED PIPE SUPPORT

△ DENOTES SLIDING PIPE SUPPORT

NOTES:

1. AERATION TANK NO. 1: TYPICAL THREE (3) LOCATIONS: REMOVE MIN 8'-0" LENGTH OF EXIST 8" DRAIN PIPING INCLUDING EXIST PLUG VALVE. INSTALL NEW 8" PD AND 8" PV AND CONNECT TO EXISTING PIPING WITH MEGALUG COUPLINGS.
2. AERATION TANK NO. 2: TYPICAL THREE (3) LOCATIONS: REMOVE EXIST 8" DRAIN PIPING INCLUDING EXIST PLUG VALVE FROM EDGE OF TANK STRUCTURE TO WYE ON DRAIN HEADER. INSTALL MJ PLUG ON WYE. INSTALL NEW 8" PD AND 8" PV AND CONNECT TO EXISTING PIPING WITH MEGALUG COUPLINGS PER DETAIL 1/M303.



BOTTOM PLAN

3/32" = 1'-0"

NO.	ISSUED FOR	DATE	BY
3	CONSTRUCTION	4/16	H&S
2	BUILDING CODE ENFORCEMENT	4/16	H&S
1	REGULATORY APPROVAL	1/16	H&S

DESIGNED MDP
DRAWN HLF
CHECKED MDP
PROJ.ENGR. JNS
APPROVED

NORTH CAROLINA PROFESSIONAL SEAL 28402 ENGINEER MICHAEL D. PARKER

Hazen

HAZEN AND SAWYER
4944 PARKWAY PLAZA BLVD, SUITE 375
CHARLOTTE, NORTH CAROLINA 28217
LICENSE NO. : C-0381

UNION COUNTY
NORTH CAROLINA

TWELVE MILE CREEK WWTP
7.5 mgd EXPANSION

AERATION TANKS NO.1 AND NO.2
MECHANICAL
BOTTOM PLAN

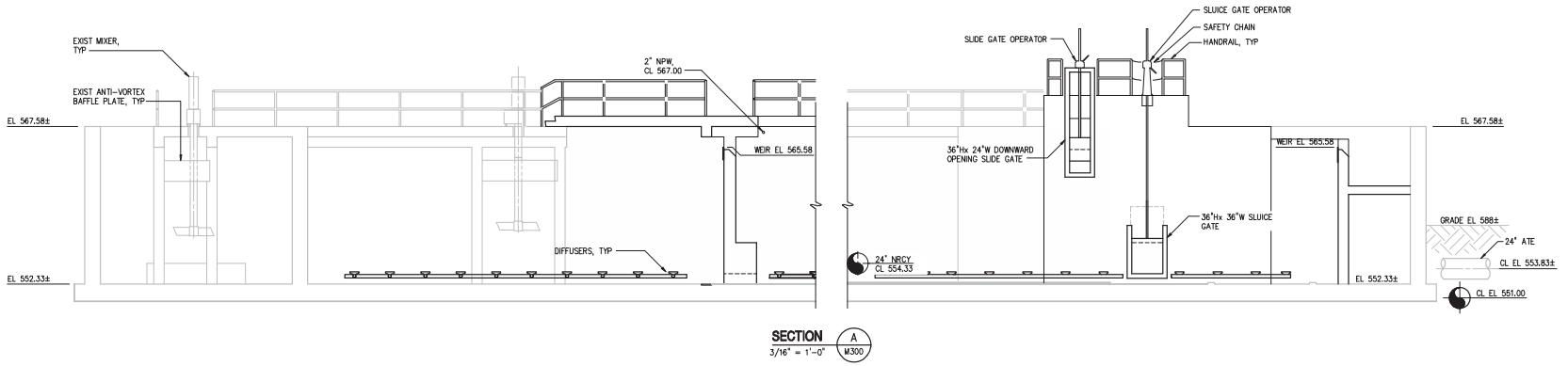
THE SCALE BAR SHOWN BELOW MEASURES ONE INCH LONG ON THE ORIGINAL DRAWING.

DATE APRIL 2016
H & S JOB NUMBER 30831-045
CONTRACT NUMBER 1
DRAWING NUMBER M300

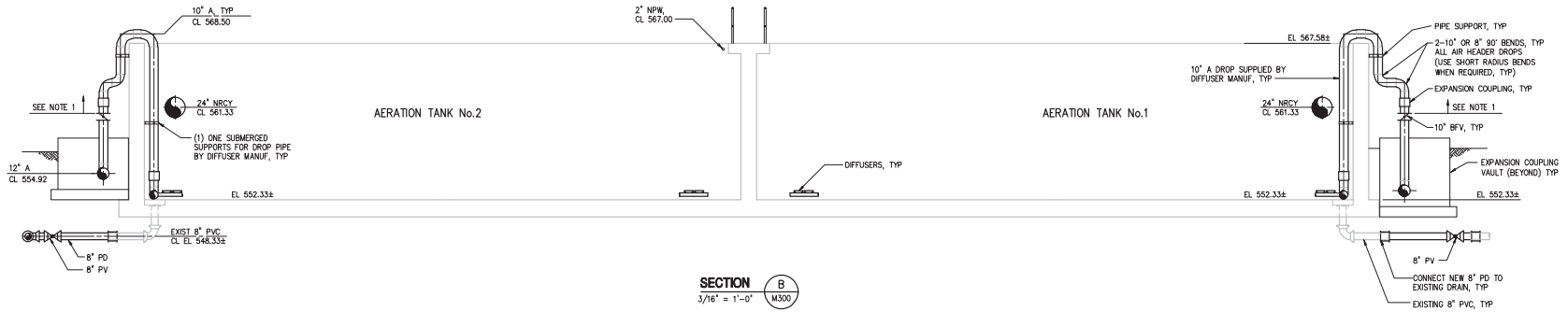
ISSUED FOR CONSTRUCTION

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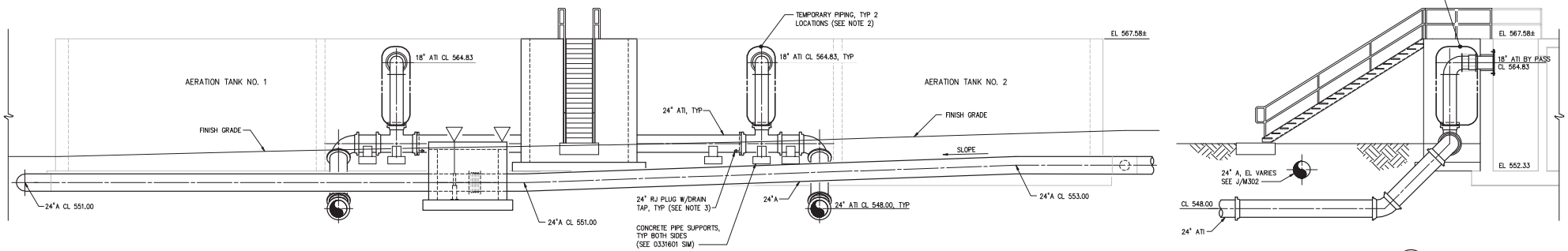
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SECTION A — 3/16" = 1'-0" — M300



SECTION B — 3/16" = 1'-0" — M300



SECTION J — 3/16" = 1'-0" — M300

SECTION E — 3/16" = 1'-0" — M300

NOTES:

1. PIPING SUPPORTS AND EQUIPMENT DOWNSTREAM OF THE BUTTERFLY VALVE SHALL BE SUPPLIED BY THE DIFFUSER MANUFACTURER UNDER SECTION 11439, TYP.
2. TEMPORARY PIPING TO BE PLACED IN SERVICE TO DEMOLISH EXISTING INFLUENT STRUCTURE AND BUILD NEW INFLUENT STRUCTURE. INSTALL 18" BLIND FLANGE AND RJ PLUG AT TERMINATIONS WHEN TEMPORARY PIPING IS REMOVED.
3. PROVIDE TEMPORARY PLUG W/DRAIN TAP SIMILAR TO STD. DETAIL 1511501. REFER TO SECTION 01520 FOR CONSTRUCTION CONSTRAINTS.

NO.	ISSUED FOR	DATE	BY
3	CONSTRUCTION	4/16	H&S
2	BUILDING CODE ENFORCEMENT	4/16	H&S
1	REGULATORY APPROVAL	1/16	H&S

DESIGNED MDP
DRAWN HLF
CHECKED MDP
PROJ.ENGR. JNS
APPROVED

NORTH CAROLINA PROFESSIONAL SEAL 22432 ENGINEER MICHAEL D. PARKER

Hazen
HAZEN AND SAWYER
4944 PARKWAY PLAZA BLVD, SUITE 375
CHARLOTTE, NORTH CAROLINA 28217
LICENSE NO. : C-0381

UNION COUNTY
NORTH CAROLINA

TWELVE MILE CREEK WWTP
7.5 mgd EXPANSION

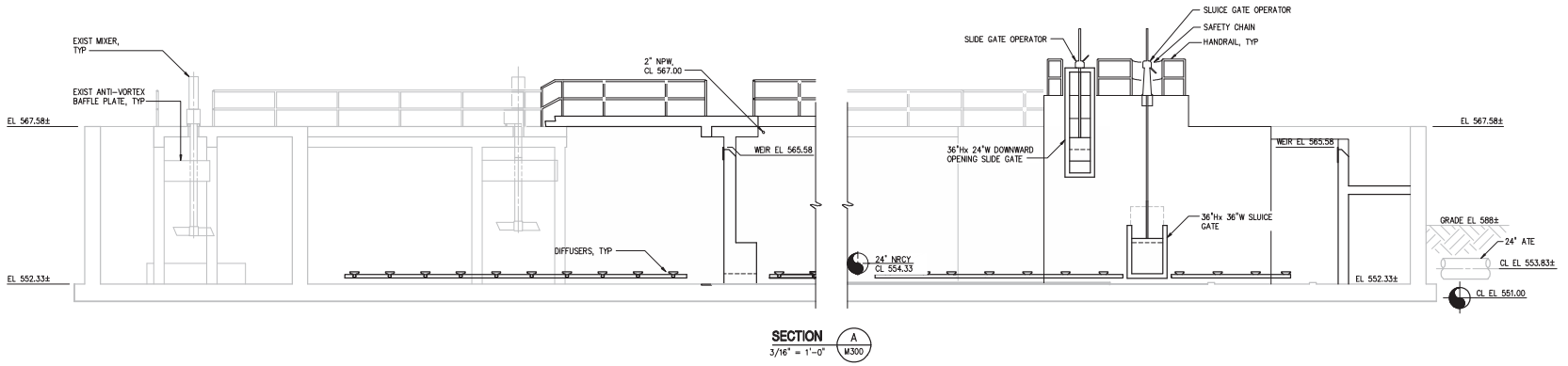
AERATION TANKS NO.1 AND NO.2
MECHANICAL
SECTIONS

THE SCALE BAR SHOWN BELOW MEASURES ONE INCH LONG ON THE ORIGINAL DRAWING.

DATE APRIL 2016
H & S JOB NUMBER 30831-045
CONTRACT NUMBER 1
DRAWING NUMBER M302

ISSUED FOR CONSTRUCTION

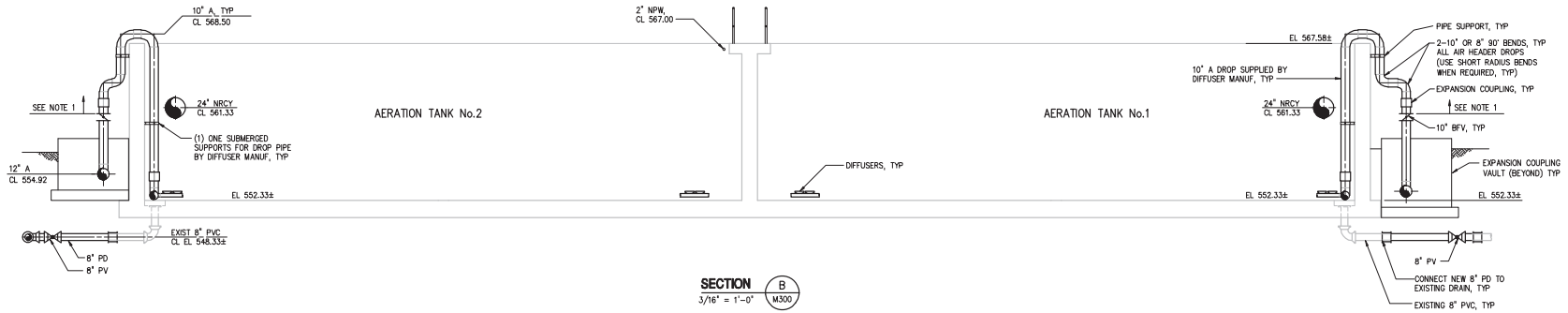
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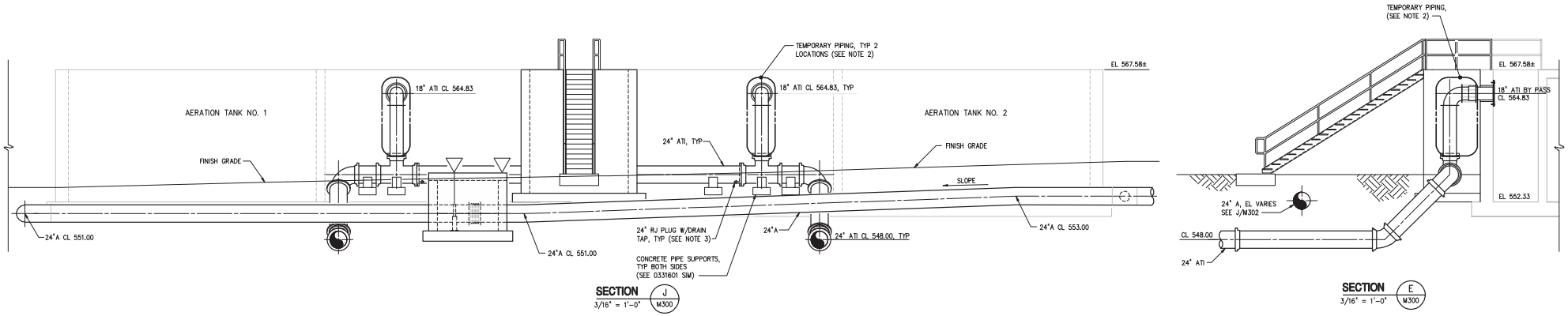
SECTION A — 3/16" = 1'-0" — M300

NOTES:

1. PIPING SUPPORTS AND EQUIPMENT DOWNSTREAM OF THE BUTTERFLY VALVE SHALL BE SUPPLIED BY THE DIFFUSER MANUFACTURER UNDER SECTION 11439, TYP.
2. TEMPORARY PIPING TO BE PLACED IN SERVICE TO DEMOLISH EXISTING INFLUENT STRUCTURE AND BUILD NEW INFLUENT STRUCTURE. INSTALL 18" BLIND FLANGE AND RJ PLUG AT TERMINATIONS WHEN TEMPORARY PIPING IS REMOVED.
3. PROVIDE TEMPORARY PLUG W/DRAIN TAP SIMILAR TO STD. DETAIL 1511501. REFER TO SECTION 01520 FOR CONSTRUCTION CONSTRAINTS.



SECTION B — 3/16" = 1'-0" — M300



SECTION J — 3/16" = 1'-0" — M300

SECTION E — 3/16" = 1'-0" — M300

NO.	ISSUED FOR	DATE	BY
3	CONSTRUCTION	4/16	H&S
2	BUILDING CODE ENFORCEMENT	4/16	H&S
1	REGULATORY APPROVAL	1/16	H&S

DESIGNED MDP
DRAWN HLF
CHECKED MDP
PROJ.ENGR. JNS
APPROVED

NORTH CAROLINA PROFESSIONAL SEAL 22432 ENGINEER MICHAEL D. PARKER

Hazen

HAZEN AND SAWYER
4944 PARKWAY PLAZA BLVD, SUITE 375
CHARLOTTE, NORTH CAROLINA 28217
LICENSE NO. : C-0381

UNION COUNTY
NORTH CAROLINA

TWELVE MILE CREEK WWTP
7.5 mgd EXPANSION

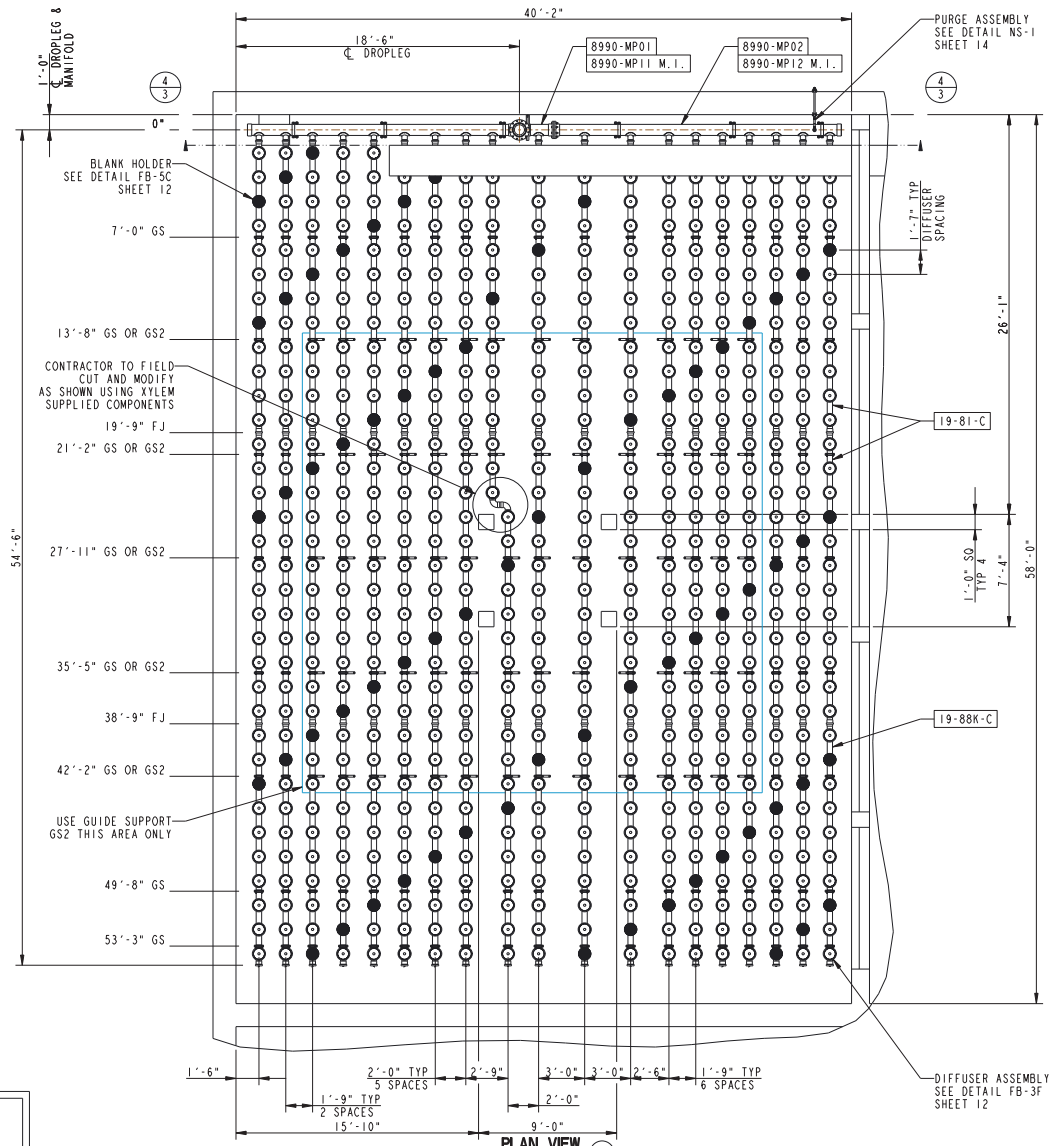
AERATION TANKS NO.1 AND NO.2
MECHANICAL
SECTIONS

THE SCALE BAR SHOWN BELOW MEASURES ONE INCH LONG ON THE ORIGINAL DRAWING.

DATE APRIL 2016
H & S JOB NUMBER 30831-045
CONTRACT NUMBER 1
DRAWING NUMBER M302

ISSUED FOR CONSTRUCTION

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PLAN VIEW (2)

GRID TYPE A
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE A
4-TANK(S)
1-GRID(S) PER TANK
19-AIR DISTRIBUTORS PER GRID
34-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
646-DIFFUSER HOLDERS PER GRID
575-DIFFUSER ELEMENTS INSTALLED PER GRID
2300-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
71-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-2
SHEET-13

GS2 - GUIDE SUPPORT
SEE DETAIL SUP-2A
SHEET-13

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

FOR GS & GS2		
TANK	SUPPORT	STRUT
1 & 2	2354-3SP	1878-48
5 & 6	2354-2SP	1878-46

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

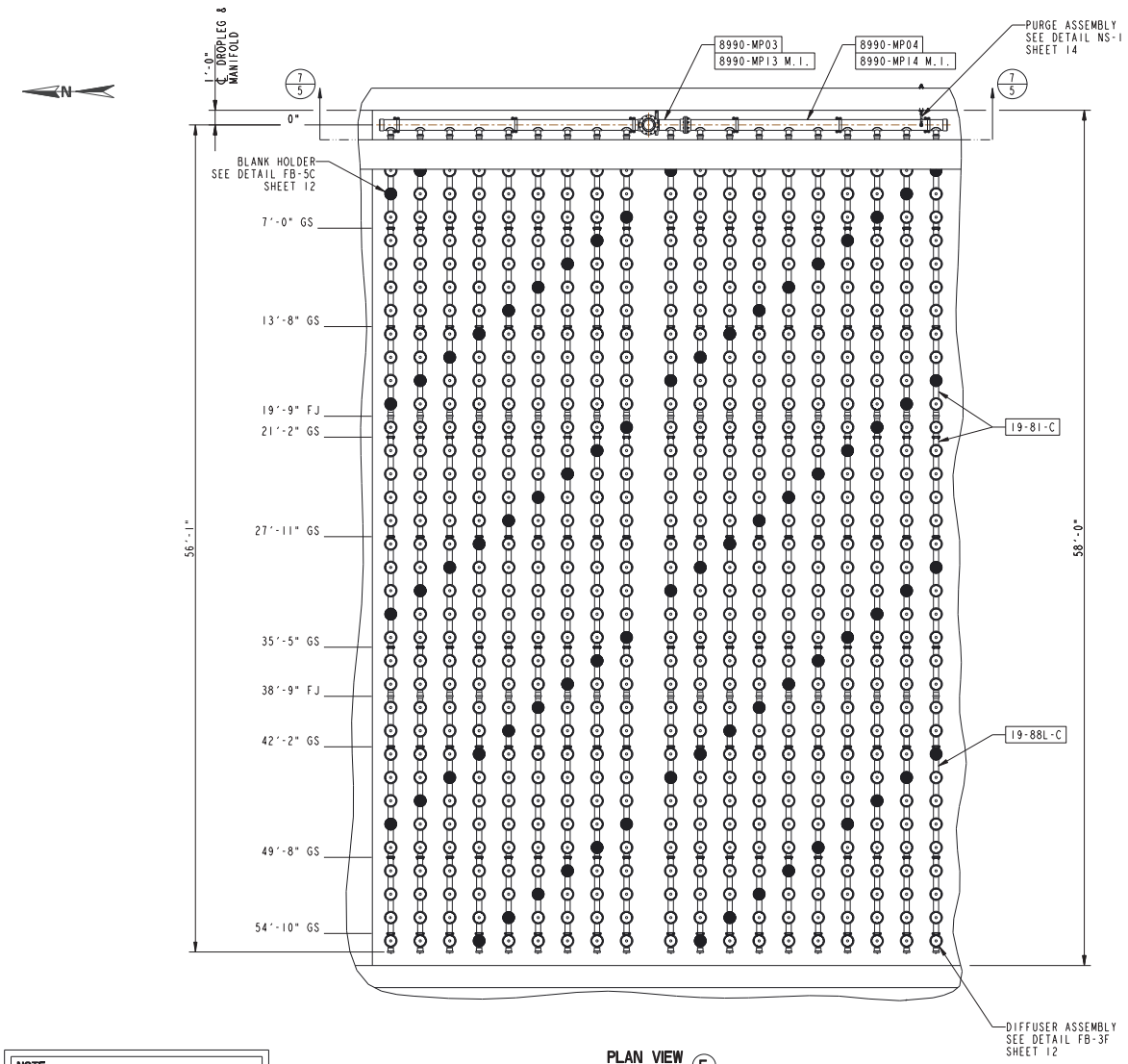
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PLAN VIEW
GRID TYPE A

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY TJC	DATE 01/06/17	JOB NO.	16-8990S
CHKD BY JS	DATE 02/01/17	DWG NO.	E-2
APPVD BY JS	DATE 02/01/17	SIZE D	REV. B

SHEET 2 OF 14



PLAN VIEW (5)

GRID TYPE B
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE B
4-TANK(S)
1-GRID(S) PER TANK
19-AIR DISTRIBUTORS PER GRID
35-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
665-DIFFUSER HOLDERS PER GRID
588-DIFFUSER ELEMENTS INSTALLED PER GRID
2352-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
77-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-1
SHEET-13

FOR GS	
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

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FOR APPROVAL ONLY.
NOT FOR CONSTRUCTION.
xylem
03/21/17

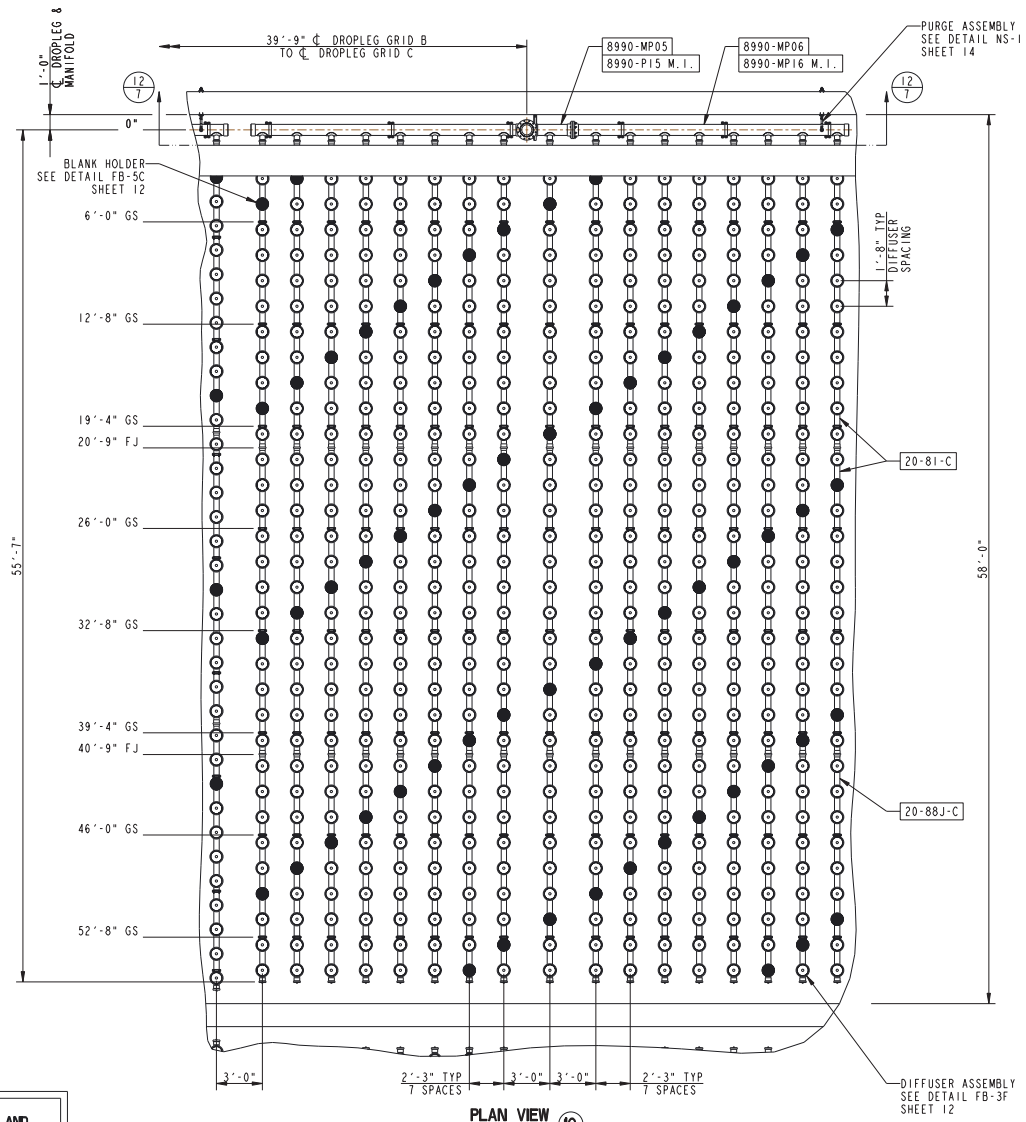
PLAN VIEW
GRID TYPE B

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY	TJC DATE 01/06/17	SHOP	
CHKD BY	JS DATE 02/01/17	SITE	
APPVD BY	JS DATE 02/01/17	SIZE D REV. B	JOB NO. 16-8990S
			DRAWING NO. E-4

SHEET 4 OF 14



PLAN VIEW (10)

GRID TYPE C
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE C
4-TANK(S)
1-GRID(S) PER TANK
17-AIR DISTRIBUTORS PER GRID
33-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
561-DIFFUSER HOLDERS PER GRID
499-DIFFUSER ELEMENTS INSTALLED PER GRID
1996-TOTAL DIFFUSER ELEMENTS INSTALLED FOR THIS GRID TYPE
62-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT SEE DETAIL FB-10A SHEET-12

GS - GUIDE SUPPORT SEE DETAIL SUP-1 SHEET-13

FOR GS	
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION SEE DETAIL FB-22K SHEET-12

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

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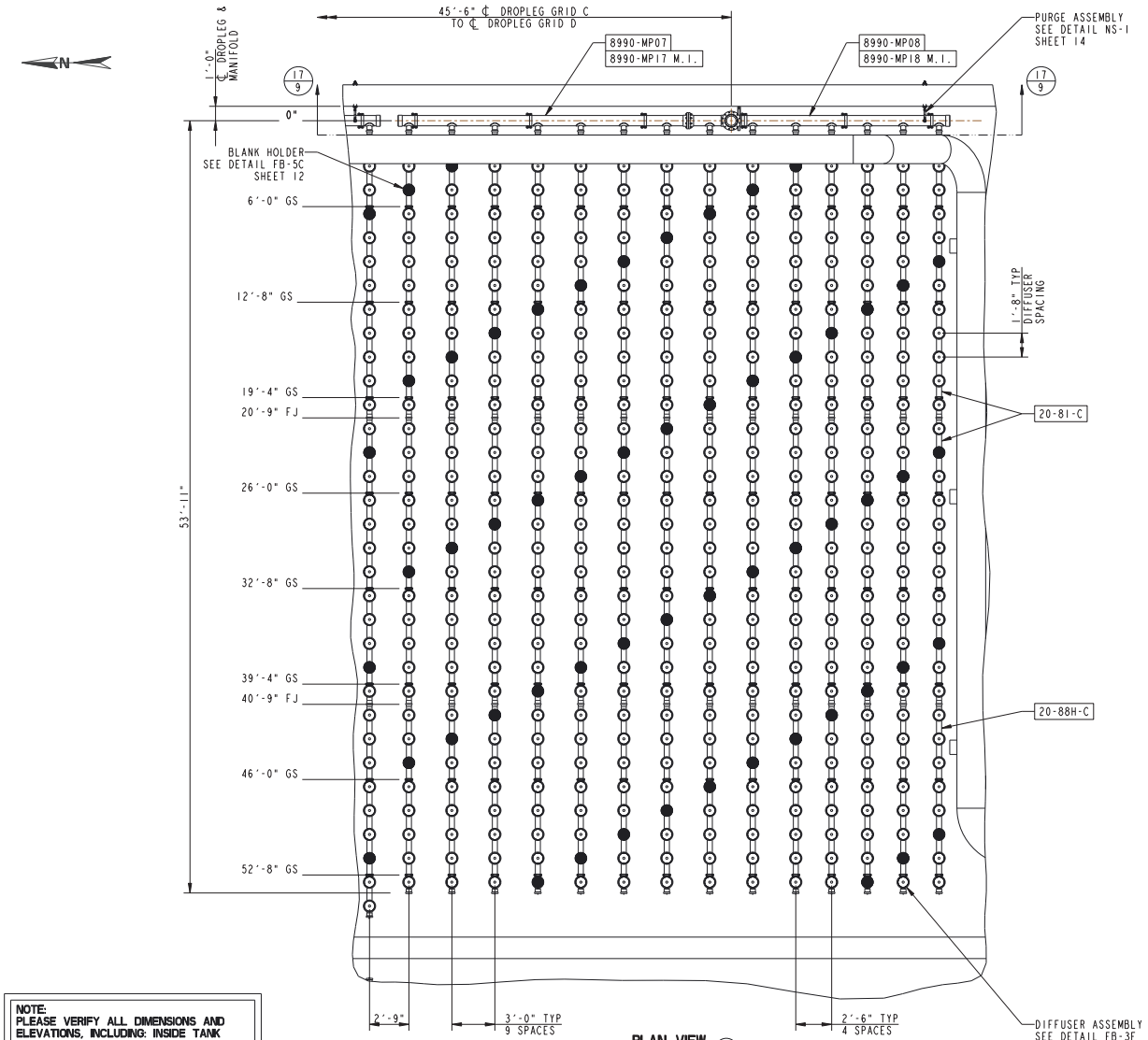
PLAN VIEW
GRID TYPE C

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY	TJC	DATE 01/06/17	DSGN
CHKD BY	JS	DATE 02/01/17	DTL
APPVD BY	JS	DATE 02/01/17	SIZE D REV. B

JOB NO. 16-8990S
DRWG NO. E-6
SHEET 6 OF 14

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS



PLAN VIEW (15)

GRID TYPE D
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

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GRID TYPE D
4-TANK(S)
1-GRID(S) PER TANK
14-AIR DISTRIBUTORS PER GRID
32-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
448-DIFFUSER HOLDERS PER GRID
392-DIFFUSER ELEMENTS INSTALLED PER GRID
1568-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
56-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-1
SHEET-13

FOR GS	
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

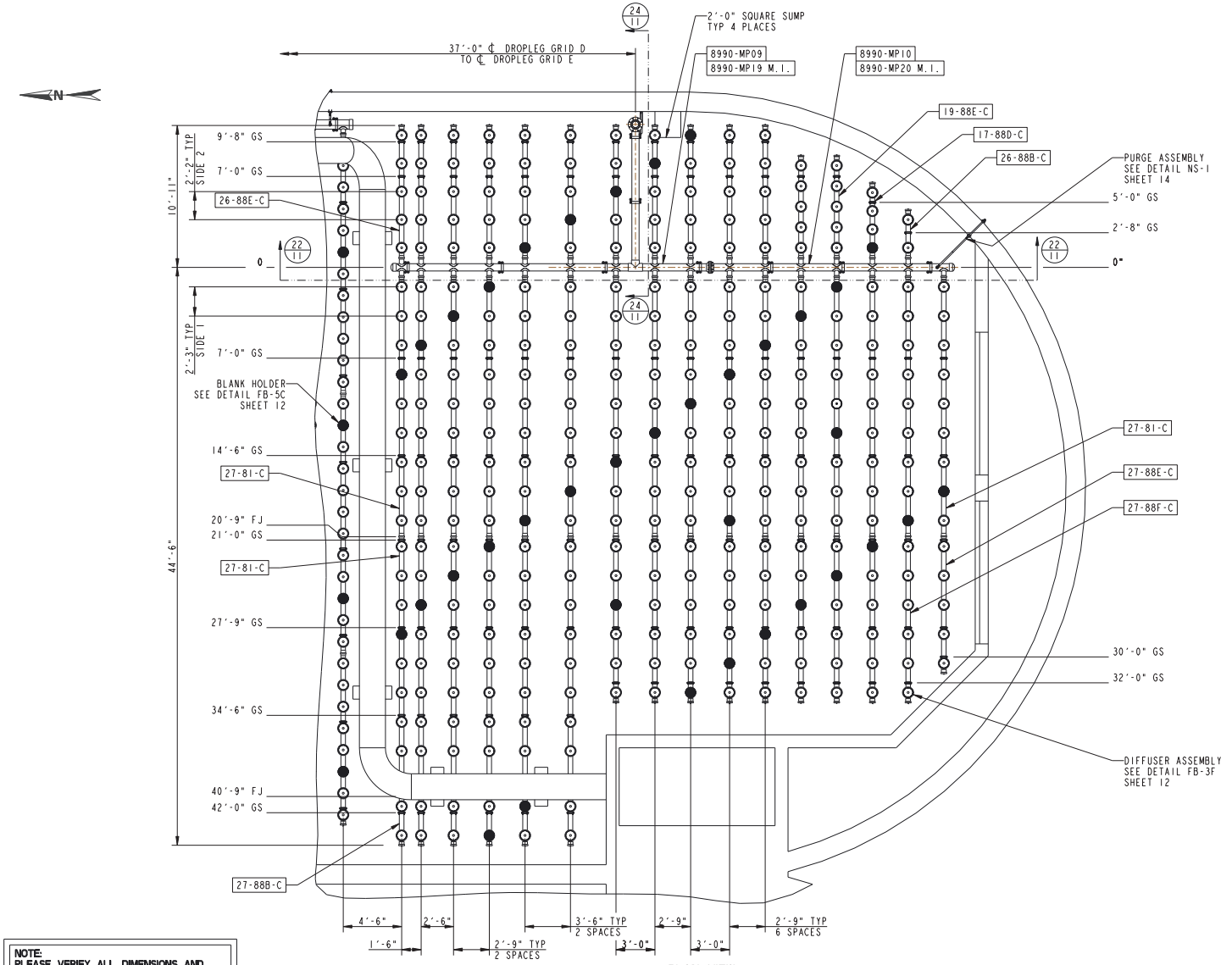
THIS DRAWING IS THE PROPERTY OF XYLEM AND IS SUBMITTED IN CONFIDENCE. IT IS NOT TO BE DISCLOSED, USED OR DUPLICATED WITHOUT PERMISSION OF XYLEM.

PLAN VIEW
GRID TYPE D

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY TJC DATE 01/06/17	DSGN	JOB NO.	16-8990S
CHKD BY JS DATE 02/01/17	DTL	DRWG NO.	E-8
APPVD BY JS DATE 02/01/17	SIZE D REV. B		SHEET 8 OF 14

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS



PLAN VIEW (20)

GRID TYPE E
2 REQ'D AS SHOWN (TANK 1 AND 5)
2 REQ'D MIRROR IMAGE (TANK 2 AND 6)

NOTE: SUPPORT SPACING

Every attempt has been made to insure locational dimensions of the supports are correct. However, after one line of air distributor anchors for any grid type have been installed, the locationsmust be checked for proper clearances by installing the supplied air headers. Spacing between lines must be checked for fit with the cross manifold and drain line. Any discrepancies or interferences must be brought to the attention of XYLEM prior to further installation.

The actual support anchor locations must be indexed from the centerline of the manifold. The actual accumulative dimensional error from the manifold to the anchor bolt must not exceed ± 3/4".

GRID TYPE E
4-TANK(S)
1-GRID(S) PER TANK
16-AIR DISTRIBUTORS PER GRID
VARIES-DIFFUSER HOLDERS PER DISTRIBUTOR
VARIES-DIFFUSER ELEMENTS PER DISTRIBUTOR
340-DIFFUSER HOLDERS PER GRID
303-DIFFUSER ELEMENTS INSTALLED PER GRID
1212-TOTAL DIFFUSER ELEMENTS INSTALLED
FOR THIS GRID TYPE
37-BLANKS PER GRID

LEGEND

FJ - FIXED JOINT
SEE DETAIL FB-10A
SHEET-12

GS - GUIDE SUPPORT
SEE DETAIL SUP-1
SHEET-13

	FOR GS
TANK	SUPPORT
1 & 2	2346-3SP
5 & 6	2346-2SP

- FOR TYPICAL AIR DISTRIBUTOR SECTION
SEE DETAIL FB-22K
SHEET-12

NOTE:
PLEASE VERIFY ALL DIMENSIONS AND ELEVATIONS, INCLUDING: INSIDE TANK DIMENSIONS, DROPLEG LOCATIONS, ELEVATIONS OF DROPLEGS CONNECTIONS, FACE OF FLANGES, DIFFUSER ELEVATIONS, FLAT FLOOR AND HIGHPOINT/LOWPOINT ELEVATIONS OF SLOPED FLOOR.

WARNING
xylem DOES NOT ACCEPT RESPONSIBILITY FOR UNDOCUMENTED CUSTOMER INITIATED CHANGES TO ELECTRONICALLY TRANSMITTED DRAWINGS

REV	DATE	REVISION	BY

UNION COUNTY
NORTH CAROLINA
TWELVE MILE CREEK
WASTEWATER TREATMENT PLANT

THIS DRAWING IS THE PROPERTY OF XYLEM AND IS SUBMITTED IN CONFIDENCE. IT IS NOT TO BE DISCLOSED, USED OR DUPLICATED WITHOUT PERMISSION OF XYLEM.

PLAN VIEW
GRID TYPE E

SANITAIRE
a xylem brand
BROWN DEER, WISCONSIN 53223

DRWN BY	TJC	DATE 01/06/17	SHEET
CHKD BY	JS	DATE 02/01/17	JOB NO. 16-8990S
APPVD BY	JS	DATE 02/01/17	SIZE D REV. B
			DRWG NO. E-10

10 OF 14

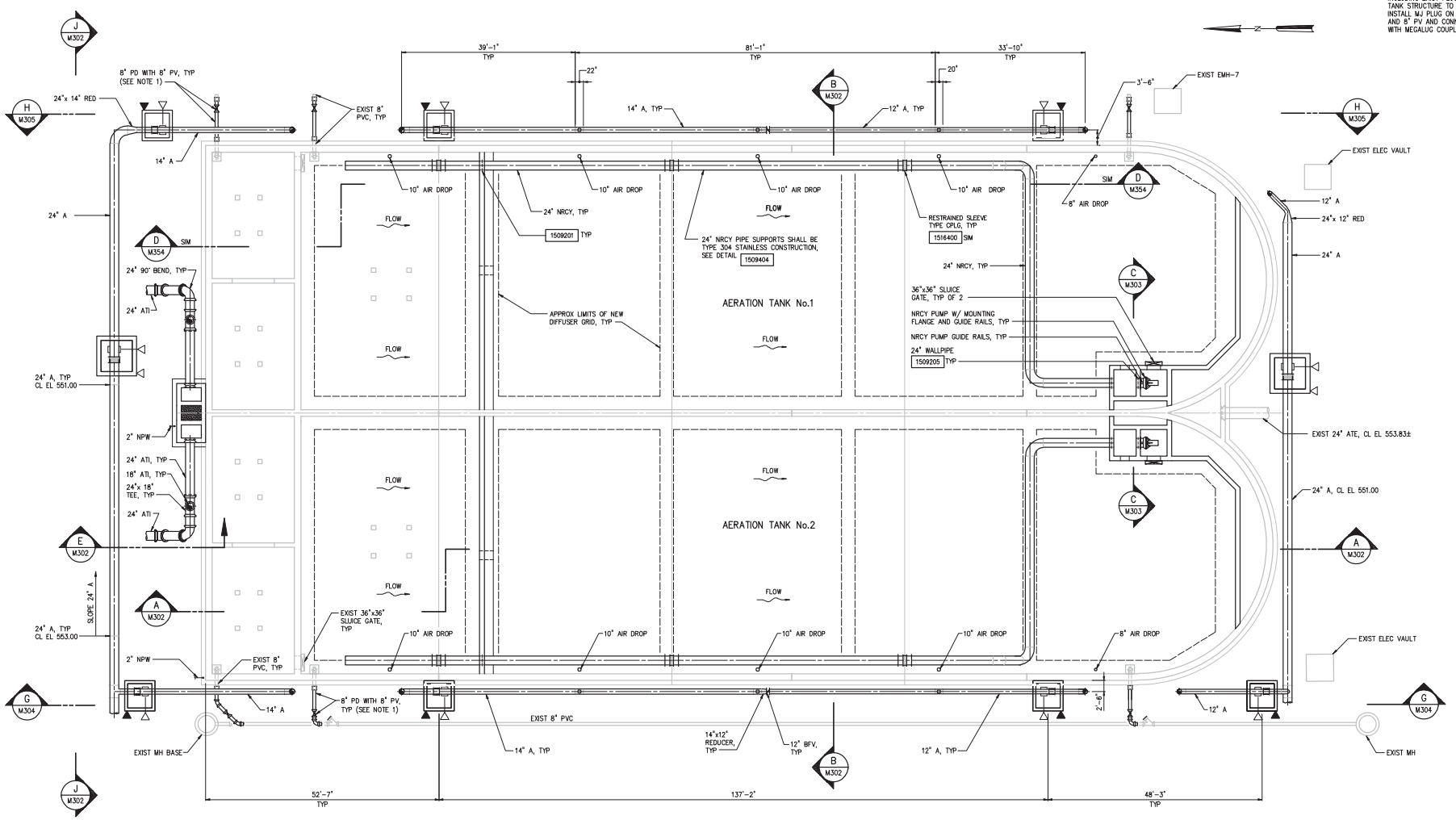
LEGEND

▲ DENOTES FIXED PIPE SUPPORT

△ DENOTES SLIDING PIPE SUPPORT

NOTES:

1. AERATION TANK NO. 1: TYPICAL THREE (3) LOCATIONS: REMOVE MIN 8'-0" LENGTH OF EXIST 8" DRAIN PIPING INCLUDING EXIST PLUG VALVE. INSTALL NEW 8" PD AND 8" PV AND CONNECT TO EXISTING PIPING WITH MEGALUG COUPLINGS.
2. AERATION TANK NO. 2: TYPICAL THREE (3) LOCATIONS: REMOVE EXIST 8" DRAIN PIPING INCLUDING EXIST PLUG VALVE FROM EDGE OF TANK STRUCTURE TO WYE ON DRAIN HEADER. INSTALL MJ PLUG ON WYE. INSTALL NEW 8" PD AND 8" PV AND CONNECT TO EXISTING PIPING WITH MEGALUG COUPLINGS PER DETAIL 1/M303.



BOTTOM PLAN

3/32" = 1'-0"

NO.	ISSUED FOR	DATE	BY
3	CONSTRUCTION	4/16	H&S
2	BUILDING CODE ENFORCEMENT	4/16	H&S
1	REGULATORY APPROVAL	1/16	H&S

DESIGNED MDP
DRAWN HLF
CHECKED MDP
PROJ.ENGR. JNS
APPROVED

NORTH CAROLINA PROFESSIONAL SEAL 28402 ENGINEER MICHAEL D. PARKER

Hazen

HAZEN AND SAWYER
4944 PARKWAY PLAZA BLVD, SUITE 375
CHARLOTTE, NORTH CAROLINA 28217
LICENSE NO. : C-0381

UNION COUNTY
NORTH CAROLINA

TWELVE MILE CREEK WWTP
7.5 mgd EXPANSION

AERATION TANKS NO.1 AND NO.2
MECHANICAL
BOTTOM PLAN

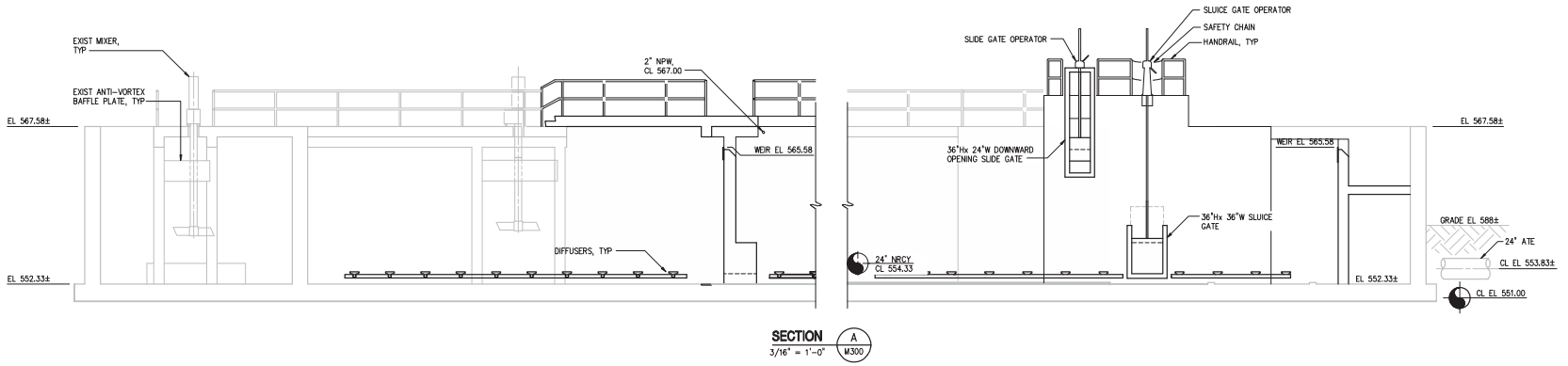
THE SCALE BAR SHOWN BELOW MEASURES ONE INCH LONG ON THE ORIGINAL DRAWING.

DATE APRIL 2016
H & S JOB NUMBER 30831-045
CONTRACT NUMBER 1
DRAWING NUMBER M300

ISSUED FOR CONSTRUCTION

PLOT DATE: 4/21/2016 1:21 PM BY: LETTER

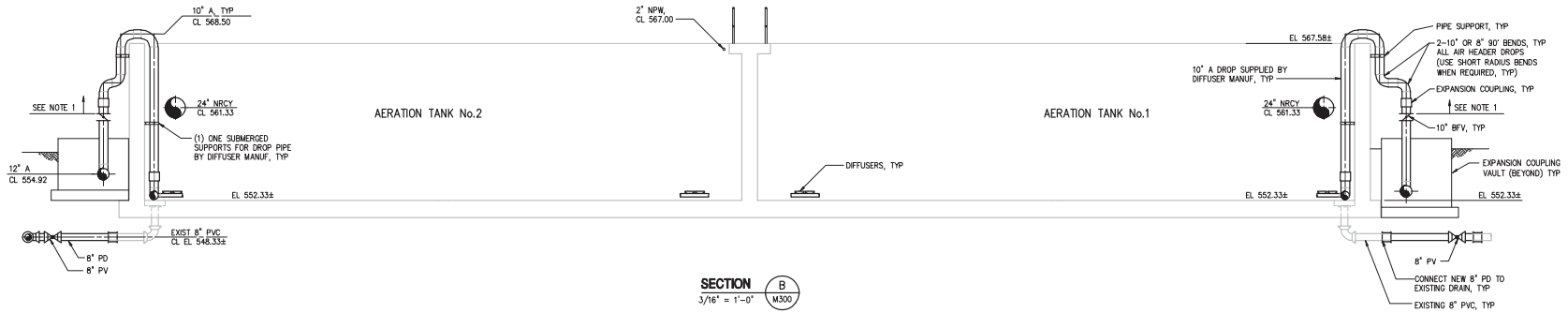
2016/04/20 2:23P D:\30831\30831-045\Drawings\MECH\M300.dwg By:LETTER Last Saved By: mkrammalocky XRefs= ..\Title Blocks\30831-045-RSTBL..\300 - AB 1&2\AB12-PBL..\300 - AB 1&2\AB12-SECTION CUTS



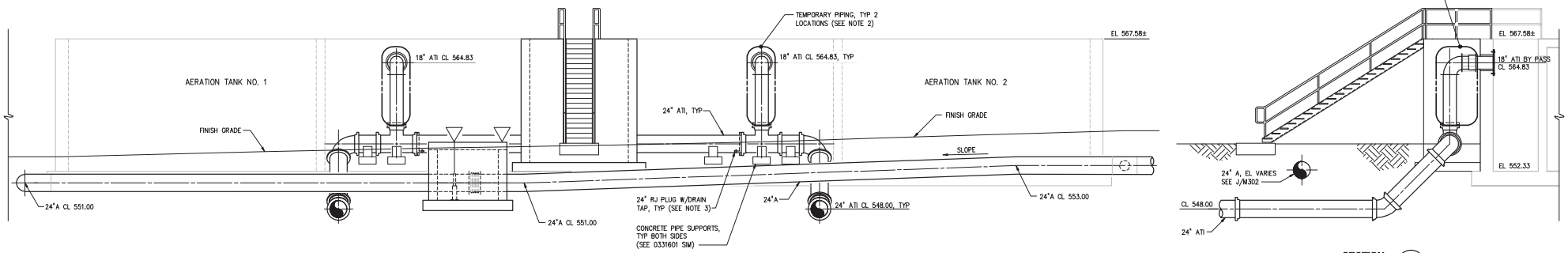
SECTION A
3/16" = 1'-0" M300

NOTES:

1. PIPING SUPPORTS AND EQUIPMENT DOWNSTREAM OF THE BUTTERFLY VALVE SHALL BE SUPPLIED BY THE DIFFUSER MANUFACTURER UNDER SECTION 11439, TYP.
2. TEMPORARY PIPING TO BE PLACED IN SERVICE TO DEMOLISH EXISTING INFLUENT STRUCTURE AND BUILD NEW INFLUENT STRUCTURE. INSTALL 18" BLIND FLANGE AND RJ PLUG AT TERMINATIONS WHEN TEMPORARY PIPING IS REMOVED.
3. PROVIDE TEMPORARY PLUG W/DRAIN TAP SIMILAR TO STD. DETAIL 1511501. REFER TO SECTION 01520 FOR CONSTRUCTION CONSTRAINTS.



SECTION B
3/16" = 1'-0" M300



SECTION J
3/16" = 1'-0" M300

SECTION E
3/16" = 1'-0" M300

NO.	ISSUED FOR	DATE	BY
3	CONSTRUCTION	4/16	H&S
2	BUILDING CODE ENFORCEMENT	4/16	H&S
1	REGULATORY APPROVAL	1/16	H&S

DESIGNED MDP
DRAWN HLF
CHECKED MDP
PROJ.ENGR. JNS
APPROVED

NORTH CAROLINA PROFESSIONAL SEAL 22032 ENGINEER MICHAEL D. PARKER

Hazen
HAZEN AND SAWYER
4944 PARKWAY PLAZA BLVD, SUITE 375
CHARLOTTE, NORTH CAROLINA 28217
LICENSE NO. : C-0381

UNION COUNTY
NORTH CAROLINA

TWELVE MILE CREEK WWTP
7.5 mgd EXPANSION

AERATION TANKS NO.1 AND NO.2
MECHANICAL
SECTIONS

THE SCALE BAR SHOWN BELOW MEASURES ONE INCH LONG ON THE ORIGINAL DRAWING.

DATE APRIL 2016
H & S JOB NUMBER 30831-045
CONTRACT NUMBER 1
DRAWING NUMBER M302

ISSUED FOR CONSTRUCTION

PLOT DATE: 4/27/2016 1:29 PM BY: JJESTER
2016/04/26 1:23P D:\30831\30831-045\Drawings\MECH\M302.dwg By:JJESTER Last Saved By: jbenedict Xrefs= ..\Title Blocks\30831-045-HSTBL..\300 - AB 1&2\AB12-S01...\300 - AB 1&2\AB12-S02...\300 - AB 1&2\AB12-S18...\300 - AB 1&2\AB12-S17

12 APPENDIX E – SAMPLE VENDOR PAYMENT NOTIFICATION

RFP 2026-044 Aeration Tank Cleaning

Informational Purposes Only - Do not submit with proposal.

Finance Department
500 North Main Street Suite #714
Monroe, NC 28112 T. 704-283-3813
www.unioncountync.gov

ATTENTION: ACCOUNTS PAYABLE VENDORS

As part of our Fraud Prevention Program, Union County now prefers two methods for payments to vendor accounts. These methods allow for faster and easier payments to vendors.

The first and preferred method available is to accept a VISA card payment from the County. If you accept payment via VISA, payment is made at the time of the transaction or upon receipt and approval of the invoice.

The second method is an Electronic Funds Transfer. (EFT) This means that you will receive payment of invoices due directly into your bank account. With this method, you will get an email confirmation giving you the date, invoice numbers, and total amount paid. Your payment will be available to you on Monday (or the first banking day if Monday is a bank holiday) following receipt of an approved invoice from the County department invoiced.

An EFT Enrollment Form to enroll in the program is attached for your convenience. You can also visit the Union County website at www.unioncountync.gov at any time to get a new form if your banking information changes. If the banking information changes and you do not notify us, it will delay receipt of payment for invoices.

If you wish to receive payment via the County's VISA card, please contact Heather Howey at 704-283-3539, or send an email to ap@unioncountync.gov and you will be added to the list of vendors accepting the VISA card method of payment.

Union County prefers all vendors participate in one of the two methods described above.

Thank you in advance for your participation.

13 APPENDIX F – TEMPLATE CONTRACT

RFP 2026-044 Aeration Tank Cleaning

Informational Purposes Only - Do not submit with proposal.

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 North Main Street, Monroe, NC 28112, hereinafter "Union," and [Contractor's full legal name], a [type of business (corporation, limited liability company, etc.) and state where incorporated], whose address is _____, hereinafter "Contractor."

W I T N E S S E T H

WHEREAS, Union desires that Contractor perform certain [briefly describe services here] services; and

WHEREAS, Contractor is willing to perform such services as described in this Agreement.

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. SERVICES PERFORMED. Contractor agrees to perform the services as set forth in the attached Scope of Work [*or, if the full RFP is to be attached as the scope of work, state the RFP number and full RFP title*], which is incorporated herein by reference (hereinafter the "Services"), in accordance with the terms of this Agreement.

2. FEE AND PAYMENT SCHEDULE. Union shall pay Contractor [insert payment amount or rate] for performance of the Services. Contractor shall invoice Union on a monthly basis for Services performed, or upon such other schedule as may be agreed upon by the parties. Payment is due within thirty (30) days of receipt of an accurate invoice by Union's Finance Division. All payments shall be conditioned upon appropriation by the Union County Board of Commissioners of sufficient funds for each request for services.

3. TERM AND TERMINATION. The Effective Date is the date of mutual execution of this Agreement. This Agreement shall have a term of [insert agreement time length] (the "Initial Term"). [*The following sentence to be used only if renewals might be needed or desired, and then only if the RFP lists the possible number of renewals. If the contract is just for a single term, this sentence may be deleted.*] Upon completion of the Initial Term, Union may, in its sole discretion, elect to renew this Agreement for up to ____[number of possible additional terms, as stated in the RFP] additional ___[number of years in each renewal term]-year terms, each a "Renewal Term," upon written notice to the Contractor. Union may terminate this Agreement at any time, without cause, upon provision of ten (10) days' written notice to Contractor. In the event of termination without cause, Contractor shall be paid for services performed to the date of notification of termination by Union.

4. OWNERSHIP OF DOCUMENTS. All deliverables and any other contract documents prepared by Contractor, or any subcontractors or subconsultants under the terms of this Agreement ("the Documents"), shall be the property of Union. Contractor further acknowledges that Union is subject to Chapter 132 of the North Carolina General Statutes, the Public Records Act (the

"Act"), and that this Agreement, as well as any of the Documents as defined herein, shall be a public record as defined in such Act, and as such, will be open to public disclosure and copying.

5. INSURANCE. The attached Exhibit A, Insurance Requirements, is incorporated herein by reference.

6. INDEMNIFICATION. Contractor agrees to protect, defend, indemnify and hold Union, 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 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.

7. DECLARATION BY CONTRACTOR. Contractor declares that Contractor has complied with all federal, state and local laws regarding business permits, certificates, and licenses that may be required to carry out the work to be performed under this Agreement.

8. FEDERAL, STATE, AND LOCAL TAXES. Neither federal, nor state, nor local income tax nor payroll tax of any kind shall be withheld or paid by Union on behalf of Contractor or the employees of Contractor. Contractor shall not be treated as an employee with respect to the services performed hereunder for federal or state tax purposes.

9. NOTICE TO CONTRACTOR REGARDING ITS TAX DUTIES AND LIABILITIES. Contractor understands that Contractor is responsible to pay, according to law, Contractor's income tax. If Contractor is not a corporation, Contractor further understands that Contractor may be liable for self-employment (social security) tax, to be paid by Contractor according to law.

10. FRINGE BENEFITS. Because Contractor is engaged in Contractor's own independently established business, Contractor is not eligible for, and shall not participate in, any employee pension, health or other fringe benefit plan of Union.

11. UNION NOT RESPONSIBLE FOR WORKERS' COMPENSATION. No workers' compensation insurance shall be obtained by Union concerning Contractor or the employees of Contractor. Contractor shall comply with the workers' compensation law concerning Contractor and the employees of Contractor.

12. NO AUTHORITY TO BIND UNION. Contractor has no authority to enter into contracts or agreements on behalf of Union. This Agreement does not create a partnership or any form of agency between the parties.

13. ASSIGNMENT. Neither Union nor Contractor shall assign, sublet or transfer any rights under or interest in this Agreement (including, but without limitation, monies that may become due or monies that are due) without the written consent of the other, except to the extent that any assignment, subletting or transfer is mandated by law or the effect of this limitation may be restricted by law. Unless specifically stated to the contrary in any written consent to assignment, no

assignment shall release or discharge the assignor from any duty or responsibility under this Agreement.

14. NON-WAIVER. The failure of either party to exercise any of its rights under this agreement for a breach thereof shall not be deemed to be a waiver of such rights or a waiver of any subsequent breach.

15. HOW NOTICES SHALL BE GIVEN. Any notice given in connection with this agreement shall be given in writing and shall be delivered either by hand to the party or by certified mail, return receipt requested, to the party at the party's address stated herein. Any party may change its address stated herein by giving notice of the change in accordance with this paragraph.

16. APPLICABLE LAW AND JURISDICTION. 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.

17. COMPLETE AGREEMENT. This Agreement contains the complete agreement of the parties regarding the terms and conditions of the Agreement, and there are no oral or written conditions, terms, warranties, understandings or other agreements pertaining thereto which have not been incorporated herein. This Agreement may be modified only by written instrument duly executed by both parties, or their respective successors in interest.

18. SEVERABILITY. The provisions hereof are severable, and should any provision be determined to be invalid, unlawful or otherwise null and void by any court of competent jurisdiction, the other provisions shall remain in full force and effect and shall not thereby be affected unless such ruling shall make further performance hereunder impossible or impose an unconscionable burden upon one of the parties.

19. AUTHORITY. Each party warrants that it has the corporate or other organizational power and authority to execute, deliver and perform this Agreement. Each party 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.

20. 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. Contractor shall ensure that Contractor 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. A breach of this provision by Contractor will be considered a breach of this Agreement, which entitles Union to terminate this Agreement, without penalty, upon notice to Contractor.

[*Signatures follow on the next page.*]

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

UNION COUNTY

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

[CONTRACTOR'S FULL LEGAL NAME]

By: _____ (SEAL)

Approved as to Legal Form _____

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

_____
Deputy Finance Officer

Exhibit A
Insurance Requirements

I. <u>BASIC INSURANCE REQUIREMENTS.</u> 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 all 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. COMMERCIAL AUTOMOBILE LIABILITY

$1,000,000 Combined Single Limit - Any Auto

D. 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.

E. POLLUTION LIABILITY INSURANCE

$1,000,000 Claims Made

Contractor shall provide evidence of continuation or renewal of Pollution Liability Insurance for a period of two (2) years following termination of the Agreement.

F. NETWORK SECURITY & PRIVACY LIABILITY (CYBER)

$1,000,000 Claims Made
$3,000,000 Aggregate Limit

Contractor shall provide evidence of continuation or renewal of Network Security & Privacy Liability Insurance for a period of two (2) years following termination of the Agreement.

II. ADDITIONAL INSURANCE REQUIREMENTS.

A. The 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 RESPECT TO THE GENERAL LIABILITY INSURANCE POLICY.

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 County'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. Union, 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: _____
Contract #: _____

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:

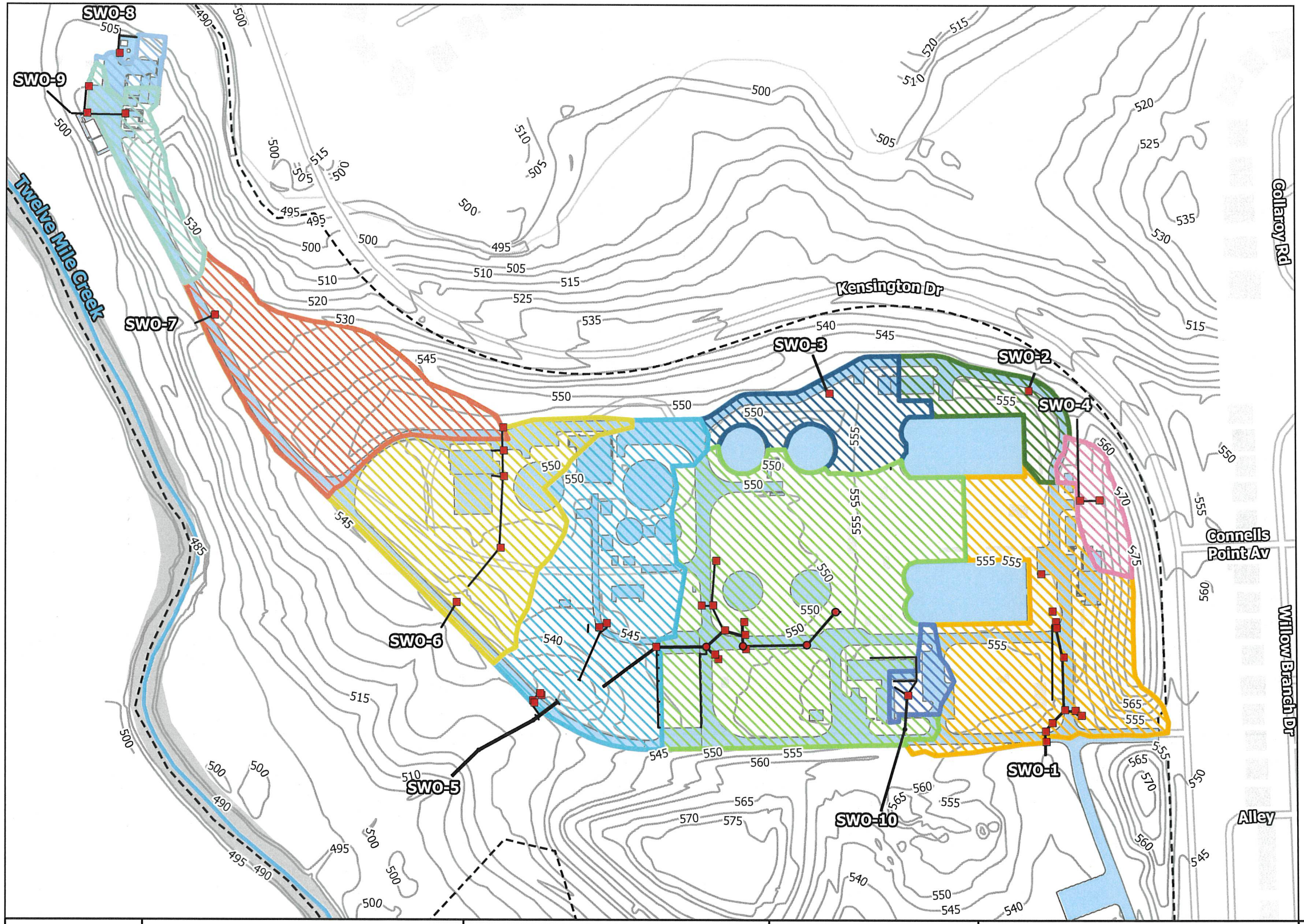
Union County
Attention: Risk Manager
500 North Main Street
Monroe, NC 28112

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.

14 APPENDIX G – STORMWATER MAP

RFP 2026-044 Aeration Tank Cleaning

Informational Purposes Only - Do not submit with proposal.



Drainage Basin	Area (acres)	Impervious Area (acres)	Impervious Area (%)	SWO	SWO Lat.	SWO Long.
A	3.453793	0.77897498	22.5541883	1	34.954034486N	-80.762906671
B	0.301058	0.16728186	55.56466233	10	34.953988250N	-80.762549899
C	6.144754	1.61337303	26.25610456	5	34.952810552N	-80.762762588
D	3.557669	1.01072952	28.40988084	5	34.954212461N	-80.762762588
E	0.487565	0.04312675	8.845334215	4	34.950890249N	-80.765068830
F	3.029322	0.86727432	28.62932116	6	34.950830593N	-80.763721730
G	1.125074	0.23608664	20.9840992	3	34.949528011N	-80.765477961
H	0.815404	0.2903732	35.61096061	2	34.949124329N	-80.765360943
I	2.621644	0.32822983	12.52000022	7	34.948742672N	-80.765676013
J	0.737967	0.32402983	43.90844444	9	34.953158909N	-80.767162441
K	0.214971	0.12629476	58.74967457	8	34.954034486N	-80.767565745

Note: SWO-2 and SWO-4 being petitioned to be representative via SWO-2.

LEGEND

- Manholes
- Inlets
- Stormwater Pipe
- Major Topography
- Impervious Surface
- Property Boundary

Drainage Areas

- SWO-1
- SWO-2
- SWO-3
- SWO-4
- SWO-5
- SWO-5
- SWO-6
- SWO-7
- SWO-8
- SWO-9
- SWO-10

N

500 250 0 Feet

1" = 250 FT

Hazen

9101 SOUTHERN PINE BOULEVARD, SUITE 250
CHARLOTTE, NC 28273

UNIONCOUNTY WATER

UNION COUNTY
PUBLIC WORKS

TWELVE MILE CREEK
WATER RECLAMATION FACILITY

DRAINAGE AREA MAP

DATE: SEPTEMBER 2024

DRAWN BY : A. GRAY

CHECKED BY: C. MCNICOL

ATTACHMENT D

UNIONCOUNTY
north carolina

Request for Proposals 2026-044

Aeration Tank Cleaning

ADDENDUM No. 1

ISSUE DATE: February 2, 2025

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named RFP document.

The following items add to, modify, and/or clarify the RFP documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the RFP document.

CLARIFICATION / CORRECTION – PRE-BID CONFERENCE DATE

The County has identified an inconsistency in the Proposal Documents regarding the Pre-Bid Conference date.

The following clarification is hereby issued:

Pre-Bid Conference: February 18, 2026 at 10:00 AM

RFP Due Date: March 17, 2026 at 11:00 AM

Any reference to a Pre-Bid Conference date of February 11, 2026 is incorrect and shall be disregarded.

This clarification supersedes all conflicting information contained in the RFP documents, including page 26 and any other location where the incorrect date may appear.

End of Addendum No. 1

UNIONCOUNTY
north carolina

Request for Proposals 2026-044

Aeration Tank Cleaning

ADDENDUM No. 2

ISSUE DATE: February 26, 2026

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named RFP document.

The following items add to, modify, and/or clarify the RFP documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the RFP document.

Delete/Add/Replace Section

1. **Add: 12 Mile Rags and Screenings TCLP**

   Located at the end of addendum 2

2. **Add: 12 Mile Solids TCLP**

   Located at the end of addendum 2

Question/Answer Section

1. **Question:** What is the Waste Code Number? (5010 number followed by 6 to 8 digits)

   Answer: Wastewater sludge (biosolids) in North Carolina generally does not require a hazardous waste code number for landfill disposal provided it is nonhazardous material which this material should be.

2. **Question:** How many tons?

   Answer: The estimated quantity of sludge is based on visual observations of sludge elevation within the tank and an assumption regarding the percentage of solids at the time of removal. The final quantity will depend on whether the material is dewatered prior to leaving the facility.

   Based on observation, the sludge depth appears to be approximately 12 inches in the first quarter of the basin, tapering to approximately 2 inches toward the end. Using the tank dimensions previously provided, bidders may perform their own calculations to estimate quantities.

   Bidders are responsible for providing an estimated quantity on the Price Form. Actual quantities may vary depending on the bidder's proposed removal and dewatering methods. Any estimates provided by County staff are for informational purposes only and are not guaranteed.

3. **Question:** Will the material pass a paint filter test?

   Answer: The solids content of the material will depend on whether it is dewatered prior to removal from the facility. If the material is removed without dewatering, it is estimated that approximately 50% would pass a paint filter test.

The County does not intend to leave basin valves open for an extended period to allow passive dewatering. The project is expected to be completed as efficiently as possible in order to return the diffusers to service and protect their integrity.

The actual solids content is unknown and will depend on the bidder's proposed processing and dewatering methods. The successful bidder will be responsible for treating and/or processing the material as necessary to meet the requirements of the designated disposal facility.

4. **Question:** Can you provide a TCLP for the aeration basin sludge taken within the last year?

Answer: The County does not have a TCLP analysis specific to the solids currently located in Aeration Basin #5. However, a TCLP analysis for biosolids collected after completion of the aeration process is attached. These solids are expected to be representative of the material in Basin #5, as they originate from the same treatment process but were collected at a different point within the facility.

Additionally, a TCLP analysis for rags and grit collected at the plant influent (12 Mile facility) is attached.

Together, these TCLP analyses are intended to provide representative data for the materials anticipated to be present in Aeration Basin #5 and subject to removal under this project.

Attached:

12 Mile Rags and Screenings TCLP

12 Mile Solids TCLP

End of Addendum No. 2

Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

December 18, 2025

Keith Purgason
Union County Public Works
8299 Kensington Drive
Waxhaw, NC 28173

RE: Project: TCLP Testing
Pace Project No.: 92831784

Dear Keith Purgason:

Enclosed are the analytical results for sample(s) received by the laboratory on December 01, 2025. The results relate only to the samples included in this report. Results reported herein conform to the applicable TNI/NELAC Standards and the laboratory's Quality Manual, where applicable, unless otherwise noted in the body of the report.

The test results provided in this final report were generated by each of the following laboratories within the Pace Network:

- Pace National - Mt. Juliet
- Pace Analytical Services - Asheville
- Pace Analytical Services - Charlotte
- Pace Analytical Services - Ormond Beach

If you have any questions concerning this report, please feel free to contact me.

Sincerely,

Stephanie Knott

Stephanie Knott
stephanie.knott@pacelabs.com
704-977-0981
Project Manager

Enclosures

cc: Julian Coley
Jonathan Jordan
Kevin Merrill

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CERTIFICATIONS

Project: TCLP Testing
Pace Project No.: 92831784

Pace Analytical Services Ormond Beach
8 East Tower Circle, Ormond Beach, FL 32174
Alaska DEC- CS/UST/LUST
Alabama Certification #: 41320
California Certification# 3096
Colorado Certification: FL NELAC Reciprocity
Connecticut Certification #: PH-0216
Delaware Certification: FL NELAC Reciprocity
DoD-ANAB #:ADE-3199
Florida Certification #: E83079
Georgia Certification #: 955
Guam Certification: FL NELAC Reciprocity
Hawaii Certification: FL NELAC Reciprocity
Illinois Certification #: 200068
Indiana Certification: FL NELAC Reciprocity
Kansas Certification #: E-10383
Kentucky Certification #: 90050
Louisiana Certification #: FL NELAC Reciprocity
Louisiana Environmental Certificate #: 05007
Maine Certification #: FL01264
Maryland Certification: #346
Massachusetts Certification #: M-FL1264
Michigan Certification #: 9911
Mississippi Certification: FL NELAC Reciprocity
Missouri Certification #: 236
Montana Certification #: Cert 0074
Nebraska Certification: NE-OS-28-14
Nevada Certification: FL NELAC Reciprocity
New Hampshire Certification #: 2958
New Jersey Certification #: FL022
New York Certification #: 11608
North Carolina Environmental Certificate #: 667
North Carolina Certification #: 12710
North Dakota Certification #: R-216
Ohio DEP 87780
Oklahoma Certification #: D9947
Pennsylvania Certification #: 68-00547
Puerto Rico Certification #: FL01264
South Carolina Certification: #96042001
Tennessee Certification #: TN02974
Texas Certification: FL NELAC Reciprocity
US Virgin Islands Certification: FL NELAC Reciprocity
Utah
Utah FL NELAC Reciprocity
Virginia Environmental Certification #: 460165
Washington Certification #: C955
West Virginia Certification #: 9962C
Wisconsin Certification #: 399079670
Wyoming (EPA Region 8): FL NELAC Reciprocity

Pace Analytical Services National
12065 Lebanon Road, Mt. Juliet, TN 37122
Alabama Certification #: 40660
Alaska Certification 17-026
Arizona Certification #: AZ0612
Arkansas Certification #: 88-0469
California Certification #: 2932
Canada Certification #: 1461.01
Colorado Certification #: TN00003
Connecticut Certification #: PH-0197
DOD Certification: #1461.01
EPA# TN00003
Florida Certification #: E87487
Georgia DW Certification #: 923
Georgia Certification: NELAP
Idaho Certification #: TN00003
Illinois Certification #: 200008
Indiana Certification #: C-TN-01
Iowa Certification #: 364
Kansas Certification #: E-10277
Kentucky UST Certification #: 16
Kentucky Certification #: 90010
Louisiana Certification #: AI30792
Louisiana DW Certification #: LA180010
Maine Certification #: TN0002
Maryland Certification #: 324
Massachusetts Certification #: M-TN003
Michigan Certification #: 9958
Minnesota Certification #: 047-999-395
Mississippi Certification #: TN00003
Missouri Certification #: 340
Montana Certification #: CERT0086
Nebraska Certification #: NE-OS-15-05
Nevada Certification #: TN-03-2002-34
New Hampshire Certification #: 2975
New Jersey Certification #: TN002
New Mexico DW Certification
New York Certification #: 11742
North Carolina Aquatic Toxicity Certification #: 41
North Carolina Drinking Water Certification #: 21704
North Carolina Environmental Certificate #: 375
North Dakota Certification #: R-140
Ohio VAP Certification #: CL0069
Oklahoma Certification #: 9915
Oregon Certification #: TN200002
Pennsylvania Certification #: 68-02979
Rhode Island Certification #: LAO00356
South Carolina Certification #: 84004
South Dakota Certification
Tennessee DW/Chem/Micro Certification #: 2006
Texas Certification #: T 104704245-17-14

REPORT OF LABORATORY ANALYSIS

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9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

CERTIFICATIONS

Project: TCLP Testing
Pace Project No.: 92831784

Pace Analytical Services National

Texas Mold Certification #: LAB0152
USDA Soil Permit #: P330-15-00234
Utah Certification #: TN00003
Vermont Dept. of Health: ID# VT-2006
Virginia Certification #: VT2006
Virginia Certification #: 460132
Washington Certification #: C847
West Virginia Certification #: 233
Wisconsin Certification #: 998093910
Wyoming UST Certification #: via A2LA 2926.01
A2LA-ISO 17025 Certification #: 1461.01
A2LA-ISO 17025 Certification #: 1461.02
AIHA-LAP/LLC EMLAP Certification #:100789

Pace Analytical Services Charlotte

South Carolina Laboratory ID: 99006
9800 Kincey Ave. Ste 100, Huntersville, NC 28078
North Carolina Drinking Water Certification #: 37706
North Carolina Field Services Certification #: 5342
North Carolina Wastewater Certification #: 12
South Carolina Laboratory ID: 99006
South Carolina Certification #: 99006001
South Carolina Drinking Water Cert. #: 99006003
Florida/NELAP Certification #: E87627
Kentucky UST Certification #: 84
Louisiana DoH Drinking Water #: LA029
Virginia/VELAP Certification #: 460221

Pace Analytical Services Asheville

2225 Riverside Drive, Asheville, NC 28804
Florida/NELAP Certification #: E87648
North Carolina Drinking Water Certification #: 37712
North Carolina Wastewater Certification #: 40
South Carolina Laboratory ID: 99030
South Carolina Certification #: 99030001
Virginia/VELAP Certification #: 460222

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Huntersville, NC 28078
(704)875-9092

SAMPLE ANALYTE COUNT

Project: TCLP Testing
Pace Project No.: 92831784

Lab ID	Sample ID	Method	Analysts	Analytes Reported	Laboratory
92831784001	**Grit Screenings**	EPA 8081B	MEW	9	PAN
		EPA 8151A	NWH	3	PAN
		EPA 8082A	SEM	8	PASI-C
		EPA 6010	ASB	7	PASI-O
		EPA 7470	JNK	1	PASI-O
		EPA 8270E	PKS	18	PASI-C
		EPA 8260D	SAS	14	PASI-C
		SM 2540G-2011	KDF	1	PASI-C
		SW-846	KDF	1	PASI-C
		1010B/ASTM D8175-18	DLS	1	PAN
		EPA 9012B	FNR	1	PAN
		EPA 9030B	LAS	1	PAN
		EPA 9045D	RJP	1	PAN
		EPA 9095B	SMS	1	PASI-A
92831784002	**Rags**	EPA 8081B	MEW	9	PAN
		EPA 8151A	NWH	3	PAN
		EPA 8082A	SEM	8	PASI-C
		EPA 6010	ASB	7	PASI-O
		EPA 7470	JNK	1	PASI-O
		EPA 8270E	PKS	18	PASI-C
		EPA 8260D	SAS	14	PASI-C
		SM 2540G-2011	KDF	1	PASI-C
		SW-846	KDF	1	PASI-C
		1010B/ASTM D8175-18	DLS	1	PAN
		EPA 9012B	FNR	1	PAN
		EPA 9030B	LAS	1	PAN
		EPA 9045D	RJP	1	PAN
		EPA 9095B	SMS	1	PASI-A

PAN = Pace National - Mt. Juliet
PASI-A = Pace Analytical Services - Asheville
PASI-C = Pace Analytical Services - Charlotte
PASI-O = Pace Analytical Services - Ormond Beach

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
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(704)875-9092

ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92831784

Sample: Grit Screenings **Lab ID: 92831784001** Collected: 12/01/25 07:15 Received: 12/01/25 12:35 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
Pesticides (GC) 8081B TCLP	Analytical Method: EPA 8081B Preparation Method: 3510C Leachate Method/Date: 1311; 12/04/25 14:31 Initial pH: 7.39; Final pH: 5.43 Pace National - Mt. Juliet							
Chlordane (Technical)	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:48	57-74-9	
Endrin	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:48	72-20-8	
gamma-BHC (Lindane)	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:48	58-89-9	
Heptachlor	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:48	76-44-8	
Heptachlor epoxide	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:48	1024-57-3	
Methoxychlor	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:48	72-43-5	
Toxaphene	ND	mg/L	0.0100	1	12/09/25 08:43	12/09/25 18:48	8001-35-2	
Surrogates								
Decachlorobiphenyl (S)	49.9	%	10.0-128	1	12/09/25 08:43	12/09/25 18:48	2051-24-3	
Tetrachloro-m-xylene (S)	86.7	%	10.0-127	1	12/09/25 08:43	12/09/25 18:48	877-09-8	
Chlorinated Herb. (GC) 8151A	Analytical Method: EPA 8151A Preparation Method: 8151A Leachate Method/Date: 1311; 12/04/25 14:31 Initial pH: 7.39; Final pH: 5.43 Pace National - Mt. Juliet							
2,4,5-TP (Silvex)	ND	mg/L	0.00200	1	12/07/25 05:26	12/08/25 18:58	93-72-1	
2,4-D	ND	mg/L	0.00200	1	12/07/25 05:26	12/08/25 18:58	94-75-7	
Surrogates								
2,4-DCAA (S)	84.2	%	14.0-158	1	12/07/25 05:26	12/08/25 18:58	19719-28-9	
8082 GCS PCB	Analytical Method: EPA 8082A Preparation Method: EPA 3546 Pace Analytical Services - Charlotte							
PCB-1016 (Aroclor 1016)	ND	ug/kg	72.7	1	12/12/25 04:33	12/12/25 17:13	12674-11-2	
PCB-1221 (Aroclor 1221)	ND	ug/kg	72.7	1	12/12/25 04:33	12/12/25 17:13	11104-28-2	
PCB-1232 (Aroclor 1232)	ND	ug/kg	72.7	1	12/12/25 04:33	12/12/25 17:13	11141-16-5	
PCB-1242 (Aroclor 1242)	ND	ug/kg	72.7	1	12/12/25 04:33	12/12/25 17:13	53469-21-9	
PCB-1248 (Aroclor 1248)	ND	ug/kg	72.7	1	12/12/25 04:33	12/12/25 17:13	12672-29-6	
PCB-1254 (Aroclor 1254)	ND	ug/kg	72.7	1	12/12/25 04:33	12/12/25 17:13	11097-69-1	
PCB-1260 (Aroclor 1260)	ND	ug/kg	72.7	1	12/12/25 04:33	12/12/25 17:13	11096-82-5	
Surrogates								
Decachlorobiphenyl (S)	66	%	10-166	1	12/12/25 04:33	12/12/25 17:13	2051-24-3	
6010 MET ICP, TCLP	Analytical Method: EPA 6010 Preparation Method: EPA 3010 Leachate Method/Date: EPA 1311; 12/04/25 16:30 Pace Analytical Services - Ormond Beach							
Arsenic	ND	mg/L	0.10	1	12/05/25 10:42	12/05/25 14:34	7440-38-2	
Barium	**0.16**	mg/L	0.10	1	12/05/25 10:42	12/05/25 14:34	7440-39-3	
Cadmium	ND	mg/L	0.010	1	12/05/25 10:42	12/05/25 14:34	7440-43-9	
Chromium	ND	mg/L	0.050	1	12/05/25 10:42	12/05/25 14:34	7440-47-3	
Lead	ND	mg/L	0.10	1	12/05/25 10:42	12/05/25 14:34	7439-92-1	L1
Selenium	ND	mg/L	0.15	1	12/05/25 10:42	12/05/25 14:34	7782-49-2	L1
Silver	ND	mg/L	0.050	1	12/05/25 10:42	12/05/25 14:34	7440-22-4	

REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92831784

Sample: Grit Screenings **Lab ID: 92831784001** Collected: 12/01/25 07:15 Received: 12/01/25 12:35 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
7470 Mercury, TCLP	Analytical Method: EPA 7470 Preparation Method: EPA 7470 Leachate Method/Date: EPA 1311; 12/04/25 16:30 Pace Analytical Services - Ormond Beach							
Mercury	ND	mg/L	0.0020	1	12/07/25 11:30	12/07/25 14:07	7439-97-6	
8270E TCLP RVE	Analytical Method: EPA 8270E Preparation Method: EPA 3510C Leachate Method/Date: EPA 1311; 12/03/25 16:17 Initial pH: 8.4; Final pH: Pace Analytical Services - Charlotte							
1,4-Dichlorobenzene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	106-46-7	
2,4-Dinitrotoluene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	121-14-2	
Hexachloro-1,3-butadiene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	87-68-3	
Hexachlorobenzene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	118-74-1	
Hexachloroethane	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	67-72-1	
2-Methylphenol(o-Cresol)	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	95-48-7	
3&4-Methylphenol(m&p Cresol)	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	15831-10-4	
Nitrobenzene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	98-95-3	
Pentachlorophenol	ND	ug/L	100	1	12/04/25 16:28	12/05/25 13:18	87-86-5	
Pyridine	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	110-86-1	
2,4,5-Trichlorophenol	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	95-95-4	
2,4,6-Trichlorophenol	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:18	88-06-2	
Surrogates								
Nitrobenzene-d5 (S)	39	%	10-133	1	12/04/25 16:28	12/05/25 13:18	4165-60-0	
2-Fluorobiphenyl (S)	24	%	10-130	1	12/04/25 16:28	12/05/25 13:18	321-60-8	
Terphenyl-d14 (S)	115	%	10-193	1	12/04/25 16:28	12/05/25 13:18	1718-51-0	
Phenol-d6 (S)	29	%	10-130	1	12/04/25 16:28	12/05/25 13:18	13127-88-3	
2-Fluorophenol (S)	34	%	10-130	1	12/04/25 16:28	12/05/25 13:18	367-12-4	
2,4,6-Tribromophenol (S)	70	%	10-166	1	12/04/25 16:28	12/05/25 13:18	118-79-6	
8260D MSV TCLP	Analytical Method: EPA 8260D Leachate Method/Date: EPA 1311; 12/04/25 10:22 Pace Analytical Services - Charlotte							
Benzene	ND	ug/L	100	20		12/05/25 21:12	71-43-2	
2-Butanone (MEK)	ND	ug/L	200	20		12/05/25 21:12	78-93-3	
Carbon tetrachloride	ND	ug/L	100	20		12/05/25 21:12	56-23-5	
Chlorobenzene	ND	ug/L	100	20		12/05/25 21:12	108-90-7	
Chloroform	ND	ug/L	100	20		12/05/25 21:12	67-66-3	
1,4-Dichlorobenzene	ND	ug/L	100	20		12/05/25 21:12	106-46-7	
1,2-Dichloroethane	ND	ug/L	100	20		12/05/25 21:12	107-06-2	
1,1-Dichloroethene	ND	ug/L	100	20		12/05/25 21:12	75-35-4	
Tetrachloroethene	ND	ug/L	100	20		12/05/25 21:12	127-18-4	
Trichloroethene	ND	ug/L	100	20		12/05/25 21:12	79-01-6	
Vinyl chloride	ND	ug/L	100	20		12/05/25 21:12	75-01-4	
Surrogates								
1,2-Dichloroethane-d4 (S)	105	%	70-130	20		12/05/25 21:12	17060-07-0	
Toluene-d8 (S)	100	%	70-130	20		12/05/25 21:12	2037-26-5	
4-Bromofluorobenzene (S)	96	%	70-130	20		12/05/25 21:12	460-00-4	

REPORT OF LABORATORY ANALYSIS

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9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92831784

Sample: Grit Screenings **Lab ID: 92831784001** Collected: 12/01/25 07:15 Received: 12/01/25 12:35 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
2540G Total Percent Solids	Analytical Method: SM 2540G-2011 Pace Analytical Services - Charlotte							
Total Solids	**45.8**	%	0.10	1		12/01/25 17:24		
Percent Moisture	Analytical Method: SW-846 Pace Analytical Services - Charlotte							
Percent Moisture	**54.2**	%	0.10	1		12/01/25 17:17		N2
Wet Chemistry 1010B/ASTM D8175	Analytical Method: 1010B/ASTM D8175-18 Pace National - Mt. Juliet							
Ignitability	**DNI at 170**	deg F		1	12/10/25 16:00	12/10/25 16:00		
Wet Chemistry 9012B	Analytical Method: EPA 9012B Preparation Method: 9012B Pace National - Mt. Juliet							
Cyanide, Reactive	ND	mg/kg	0.500	2	12/04/25 19:50	12/05/25 08:48		
Wet Chemistry 9034-9030B	Analytical Method: EPA 9030B Preparation Method: 9030B Pace National - Mt. Juliet							
Sulfide, Reactive	**96.1**	mg/kg	75.0	1	12/06/25 08:24	12/10/25 15:10		
Wet Chemistry 9045D	Analytical Method: EPA 9045D Preparation Method: 9045C/9045D Pace National - Mt. Juliet							
pH	**6.67**	Std. Units	0.10	1	12/05/25 10:37	12/05/25 15:20		H3
9095 Paint Filter Liquid Test	Analytical Method: EPA 9095B Pace Analytical Services - Asheville							
Free Liquids	**PASS**		1.0	1		12/10/25 15:37		

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Huntersville, NC 28078
(704)875-9092

ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92831784

Sample: Rags **Lab ID: 92831784002** Collected: 12/01/25 07:30 Received: 12/01/25 12:35 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
Pesticides (GC) 8081B TCLP	Analytical Method: EPA 8081B Preparation Method: 3510C Leachate Method/Date: 1311; 12/04/25 14:31 Initial pH: 5.71; Final pH: 5.12 Pace National - Mt. Juliet							
Chlordane (Technical)	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:59	57-74-9	
Endrin	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:59	72-20-8	
gamma-BHC (Lindane)	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:59	58-89-9	
Heptachlor	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:59	76-44-8	
Heptachlor epoxide	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:59	1024-57-3	
Methoxychlor	ND	mg/L	0.00500	1	12/09/25 08:43	12/09/25 18:59	72-43-5	
Toxaphene	ND	mg/L	0.0100	1	12/09/25 08:43	12/09/25 18:59	8001-35-2	
Surrogates								
Decachlorobiphenyl (S)	72.1	%	10.0-128	1	12/09/25 08:43	12/09/25 18:59	2051-24-3	
Tetrachloro-m-xylene (S)	92.8	%	10.0-127	1	12/09/25 08:43	12/09/25 18:59	877-09-8	
Chlorinated Herb. (GC) 8151A	Analytical Method: EPA 8151A Preparation Method: 8151A Leachate Method/Date: 1311; 12/04/25 14:31 Initial pH: 5.71; Final pH: 5.12 Pace National - Mt. Juliet							
2,4,5-TP (Silvex)	ND	mg/L	0.00200	1	12/07/25 05:26	12/08/25 19:09	93-72-1	
2,4-D	ND	mg/L	0.00200	1	12/07/25 05:26	12/08/25 19:09	94-75-7	
Surrogates								
2,4-DCAA (S)	79.6	%	14.0-158	1	12/07/25 05:26	12/08/25 19:09	19719-28-9	
8082 GCS PCB	Analytical Method: EPA 8082A Preparation Method: EPA 3546 Pace Analytical Services - Charlotte							
PCB-1016 (Aroclor 1016)	ND	ug/kg	187	2	12/12/25 04:33	12/12/25 17:25	12674-11-2	
PCB-1221 (Aroclor 1221)	ND	ug/kg	187	2	12/12/25 04:33	12/12/25 17:25	11104-28-2	
PCB-1232 (Aroclor 1232)	ND	ug/kg	187	2	12/12/25 04:33	12/12/25 17:25	11141-16-5	
PCB-1242 (Aroclor 1242)	ND	ug/kg	187	2	12/12/25 04:33	12/12/25 17:25	53469-21-9	
PCB-1248 (Aroclor 1248)	ND	ug/kg	187	2	12/12/25 04:33	12/12/25 17:25	12672-29-6	
PCB-1254 (Aroclor 1254)	ND	ug/kg	187	2	12/12/25 04:33	12/12/25 17:25	11097-69-1	
PCB-1260 (Aroclor 1260)	ND	ug/kg	187	2	12/12/25 04:33	12/12/25 17:25	11096-82-5	
Surrogates								
Decachlorobiphenyl (S)	25	%	10-166	2	12/12/25 04:33	12/12/25 17:25	2051-24-3	D3
6010 MET ICP, TCLP	Analytical Method: EPA 6010 Preparation Method: EPA 3010 Leachate Method/Date: EPA 1311; 12/04/25 16:30 Pace Analytical Services - Ormond Beach							
Arsenic	ND	mg/L	0.10	1	12/05/25 10:42	12/05/25 14:37	7440-38-2	
Barium	ND	mg/L	0.10	1	12/05/25 10:42	12/05/25 14:37	7440-39-3	
Cadmium	ND	mg/L	0.010	1	12/05/25 10:42	12/05/25 14:37	7440-43-9	
Chromium	ND	mg/L	0.050	1	12/05/25 10:42	12/05/25 14:37	7440-47-3	
Lead	ND	mg/L	0.10	1	12/05/25 10:42	12/05/25 14:37	7439-92-1	L1
Selenium	ND	mg/L	0.15	1	12/05/25 10:42	12/05/25 14:37	7782-49-2	L1
Silver	ND	mg/L	0.050	1	12/05/25 10:42	12/05/25 14:37	7440-22-4	

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ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92831784

Sample: Rags **Lab ID: 92831784002** Collected: 12/01/25 07:30 Received: 12/01/25 12:35 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
7470 Mercury, TCLP	Analytical Method: EPA 7470 Preparation Method: EPA 7470 Leachate Method/Date: EPA 1311; 12/04/25 16:30 Pace Analytical Services - Ormond Beach							
Mercury	ND	mg/L	0.0020	1	12/07/25 11:30	12/07/25 14:09	7439-97-6	
8270E TCLP RVE	Analytical Method: EPA 8270E Preparation Method: EPA 3510C Leachate Method/Date: EPA 1311; 12/03/25 16:17 Initial pH: 5.8; Final pH: Pace Analytical Services - Charlotte							
1,4-Dichlorobenzene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	106-46-7	
2,4-Dinitrotoluene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	121-14-2	
Hexachloro-1,3-butadiene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	87-68-3	
Hexachlorobenzene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	118-74-1	
Hexachloroethane	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	67-72-1	
2-Methylphenol(o-Cresol)	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	95-48-7	
3&4-Methylphenol(m&p Cresol)	**204**	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	15831-10-4	
Nitrobenzene	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	98-95-3	
Pentachlorophenol	ND	ug/L	100	1	12/04/25 16:28	12/05/25 13:42	87-86-5	
Pyridine	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	110-86-1	
2,4,5-Trichlorophenol	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	95-95-4	
2,4,6-Trichlorophenol	ND	ug/L	50.0	1	12/04/25 16:28	12/05/25 13:42	88-06-2	
Surrogates								
Nitrobenzene-d5 (S)	40	%	10-133	1	12/04/25 16:28	12/05/25 13:42	4165-60-0	
2-Fluorobiphenyl (S)	21	%	10-130	1	12/04/25 16:28	12/05/25 13:42	321-60-8	
Terphenyl-d14 (S)	112	%	10-193	1	12/04/25 16:28	12/05/25 13:42	1718-51-0	
Phenol-d6 (S)	32	%	10-130	1	12/04/25 16:28	12/05/25 13:42	13127-88-3	
2-Fluorophenol (S)	33	%	10-130	1	12/04/25 16:28	12/05/25 13:42	367-12-4	
2,4,6-Tribromophenol (S)	75	%	10-166	1	12/04/25 16:28	12/05/25 13:42	118-79-6	
8260D MSV TCLP	Analytical Method: EPA 8260D Leachate Method/Date: EPA 1311; 12/04/25 10:22 Pace Analytical Services - Charlotte							
Benzene	ND	ug/L	100	20		12/05/25 21:30	71-43-2	
2-Butanone (MEK)	**395**	ug/L	200	20		12/05/25 21:30	78-93-3	
Carbon tetrachloride	ND	ug/L	100	20		12/05/25 21:30	56-23-5	
Chlorobenzene	ND	ug/L	100	20		12/05/25 21:30	108-90-7	
Chloroform	ND	ug/L	100	20		12/05/25 21:30	67-66-3	
1,4-Dichlorobenzene	ND	ug/L	100	20		12/05/25 21:30	106-46-7	
1,2-Dichloroethane	ND	ug/L	100	20		12/05/25 21:30	107-06-2	
1,1-Dichloroethene	ND	ug/L	100	20		12/05/25 21:30	75-35-4	
Tetrachloroethene	ND	ug/L	100	20		12/05/25 21:30	127-18-4	
Trichloroethene	ND	ug/L	100	20		12/05/25 21:30	79-01-6	
Vinyl chloride	ND	ug/L	100	20		12/05/25 21:30	75-01-4	
Surrogates								
1,2-Dichloroethane-d4 (S)	100	%	70-130	20		12/05/25 21:30	17060-07-0	
Toluene-d8 (S)	103	%	70-130	20		12/05/25 21:30	2037-26-5	
4-Bromofluorobenzene (S)	96	%	70-130	20		12/05/25 21:30	460-00-4	

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ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92831784

Sample: Rags **Lab ID: 92831784002** Collected: 12/01/25 07:30 Received: 12/01/25 12:35 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
2540G Total Percent Solids	Analytical Method: SM 2540G-2011 Pace Analytical Services - Charlotte							
Total Solids	**35.7**	%	0.10	1		12/01/25 17:24		
Percent Moisture	Analytical Method: SW-846 Pace Analytical Services - Charlotte							
Percent Moisture	**64.3**	%	0.10	1		12/01/25 17:17		N2
Wet Chemistry 1010B/ASTM D8175	Analytical Method: 1010B/ASTM D8175-18 Pace National - Mt. Juliet							
Ignitability	**DNI at 170**	deg F		1	12/10/25 16:00	12/10/25 16:00		
Wet Chemistry 9012B	Analytical Method: EPA 9012B Preparation Method: 9012B Pace National - Mt. Juliet							
Cyanide, Reactive	**0.641**	mg/kg	0.500	2	12/04/25 19:50	12/05/25 12:10		
Wet Chemistry 9034-9030B	Analytical Method: EPA 9030B Preparation Method: 9030B Pace National - Mt. Juliet							
Sulfide, Reactive	ND	mg/kg	75.0	1	12/06/25 08:24	12/10/25 15:10		
Wet Chemistry 9045D	Analytical Method: EPA 9045D Preparation Method: 9045C/9045D Pace National - Mt. Juliet							
pH	**5.60**	Std. Units	0.10	1	12/05/25 10:37	12/05/25 15:20		H3
9095 Paint Filter Liquid Test	Analytical Method: EPA 9095B Pace Analytical Services - Asheville							
Free Liquids	**PASS**		1.0	1		12/18/25 10:07		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 2653712
QC Batch Method: 3510C
Analysis Method: EPA 8081B
Analysis Description: Pesticides (GC) 8081B
Laboratory: Pace National - Mt. Juliet

Associated Lab Samples:

METHOD BLANK: R4312025-1 Matrix: Solid
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Chlordane (Technical)	mg/L	ND	0.00500	12/09/25 18:16	
Endrin	mg/L	ND	0.00500	12/09/25 18:16	
gamma-BHC (Lindane)	mg/L	ND	0.00500	12/09/25 18:16	
Heptachlor	mg/L	ND	0.00500	12/09/25 18:16	
Heptachlor epoxide	mg/L	ND	0.00500	12/09/25 18:16	
Methoxychlor	mg/L	ND	0.00500	12/09/25 18:16	
Toxaphene	mg/L	ND	0.0100	12/09/25 18:16	
Decachlorobiphenyl (S)	%	97.7	10.0-128	12/09/25 18:16	
Tetrachloro-m-xylene (S)	%	86.4	10.0-127	12/09/25 18:16	

LABORATORY CONTROL SAMPLE: R4312025-2

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Endrin	mg/L	0.0100	0.0109	109	57.0-134	
gamma-BHC (Lindane)	mg/L	0.0100	0.0110	110	55.0-129	
Heptachlor	mg/L	0.0100	0.00984	98.4	27.0-132	
Heptachlor epoxide	mg/L	0.0100	0.0105	105	57.0-130	
Methoxychlor	mg/L	0.0100	0.0114	114	54.0-155	
Decachlorobiphenyl (S)	%			93.7	10.0-128	
Tetrachloro-m-xylene (S)	%			87.2	10.0-127	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: R4312025-3 R4312025-4

Parameter	Units	L1924292-08 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Endrin	mg/L	ND	0.0100	0.0100	ND	ND	144	137	10.0-160	4.98	
gamma-BHC (Lindane)	mg/L	ND	0.0100	0.0100	ND	ND	104	100	14.0-141	3.92	
Heptachlor	mg/L	ND	0.0100	0.0100	ND	ND	87.7	91.3	16.0-136	4.02	
Heptachlor epoxide	mg/L	ND	0.0100	0.0100	ND	ND	88.3	85.8	10.0-160	2.87	
Methoxychlor	mg/L	ND	0.0100	0.0100	ND	ND	120	121	10.0-160	0.830	
Decachlorobiphenyl (S)	%						29.0	23.4	10.0-128		
Tetrachloro-m-xylene (S)	%						85.8	74.2	10.0-127		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 2652617
QC Batch Method: 8151A
Analysis Method: EPA 8151A
Analysis Description: Chlorinated Herb. (GC) 8151A
Laboratory: Pace National - Mt. Juliet
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: R4311420-1 Matrix: Solid
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
2,4,5-TP (Silvex)	mg/L	ND	0.00200	12/08/25 14:11	
2,4-D	mg/L	ND	0.00200	12/08/25 14:11	
2,4-DCAA (S)	%	91.4	14.0-158	12/08/25 14:11	

LABORATORY CONTROL SAMPLE: R4311420-2

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
2,4,5-TP (Silvex)	mg/L	0.0250	0.0244	97.6	26.0-165	
2,4-D	mg/L	0.0250	0.0242	96.8	10.0-200	
2,4-DCAA (S)	%			90.6	14.0-158	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: R4311420-3 R4311420-4

Parameter	Units	L1923178-02 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
2,4,5-TP (Silvex)	mg/L	ND	0.0250	0.0250	ND	ND	85.6	82.4	26.0-165	3.81	
2,4-D	mg/L	ND	0.0250	0.0250	ND	ND	86.8	84.0	10.0-200	3.28	
2,4-DCAA (S)	%						81.0	80.2	14.0-158		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 1150422
QC Batch Method: EPA 7470
Analysis Method: EPA 7470
Analysis Description: 7470 Mercury TCLP
Laboratory: Pace Analytical Services - Ormond Beach
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: 6301023 Matrix: Water
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Mercury	mg/L	ND	0.00020	12/07/25 13:44	

LABORATORY CONTROL SAMPLE: 6305296

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Mercury	mg/L	0.002	0.0022	110	80-120	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 6305297 6305298

Parameter	Units	92830057001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Mercury	mg/L	ND	0.02	0.02	0.021	0.021	102	104	75-125	1	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 1149986
QC Batch Method: EPA 3010
Analysis Method: EPA 6010
Analysis Description: 6010 MET TCLP
Laboratory: Pace Analytical Services - Ormond Beach
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: 6301023 Matrix: Water
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Arsenic	mg/L	ND	0.010	12/05/25 14:11	
Barium	mg/L	ND	0.010	12/05/25 14:11	
Cadmium	mg/L	ND	0.0010	12/05/25 14:11	
Chromium	mg/L	ND	0.0050	12/05/25 14:11	
Lead	mg/L	0.086	0.010	12/05/25 14:11	
Selenium	mg/L	ND	0.015	12/05/25 14:11	
Silver	mg/L	ND	0.0050	12/05/25 14:11	

LABORATORY CONTROL SAMPLE: 6302800

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Arsenic	mg/L	0.25	0.28	111	80-120	
Barium	mg/L	0.25	0.27	107	80-120	
Cadmium	mg/L	0.025	0.024	98	80-120	
Chromium	mg/L	0.25	0.25	102	80-120	
Lead	mg/L	0.25	0.32	128	80-120	L1
Selenium	mg/L	0.25	0.30	121	80-120	L1
Silver	mg/L	0.025	0.027	109	80-120	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 6302801 6302802

Parameter	Units	92830057001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Arsenic	mg/L	1.1	2.5	2.5	3.6	3.5	99	93	75-125	4	
Barium	mg/L	ND	2.5	2.5	2.9	2.7	111	105	75-125	5	
Cadmium	mg/L	ND	0.25	0.25	0.25	0.25	98	99	75-125	1	
Chromium	mg/L	91.0	2.5	2.5	92.1	91.1	42	4	75-125	1	M1
Lead	mg/L	ND	2.5	2.5	2.9	2.8	103	101	75-125	2	
Selenium	mg/L	ND	2.5	2.5	2.7	2.6	97	93	75-125	3	
Silver	mg/L	ND	0.25	0.25	.21J	.22J	86	89	75-125		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 977338
QC Batch Method: EPA 8260D
Analysis Method: EPA 8260D
Analysis Description: 8260D MSV TCLP
Laboratory: Pace Analytical Services - Charlotte
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: 5025716 Matrix: Water
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
1,1-Dichloroethene	ug/L	ND	5.0	12/05/25 14:15	
1,2-Dichloroethane	ug/L	ND	5.0	12/05/25 14:15	
1,4-Dichlorobenzene	ug/L	ND	5.0	12/05/25 14:15	
2-Butanone (MEK)	ug/L	ND	10.0	12/05/25 14:15	
Benzene	ug/L	ND	5.0	12/05/25 14:15	
Carbon tetrachloride	ug/L	ND	5.0	12/05/25 14:15	
Chlorobenzene	ug/L	ND	5.0	12/05/25 14:15	
Chloroform	ug/L	ND	5.0	12/05/25 14:15	
Tetrachloroethene	ug/L	ND	5.0	12/05/25 14:15	
Trichloroethene	ug/L	ND	5.0	12/05/25 14:15	
Vinyl chloride	ug/L	ND	5.0	12/05/25 14:15	
1,2-Dichloroethane-d4 (S)	%	104	70-130	12/05/25 14:15	
4-Bromofluorobenzene (S)	%	95	70-130	12/05/25 14:15	
Toluene-d8 (S)	%	100	70-130	12/05/25 14:15	

LABORATORY CONTROL SAMPLE: 5025715

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
1,1-Dichloroethene	ug/L	20	22.2	111	69-131	
1,2-Dichloroethane	ug/L	20	21.0	105	70-130	
1,4-Dichlorobenzene	ug/L	20	20.3	101	70-130	
2-Butanone (MEK)	ug/L	40	39.8	100	67-133	
Benzene	ug/L	20	20.5	102	70-130	
Carbon tetrachloride	ug/L	20	19.9	100	70-130	
Chlorobenzene	ug/L	20	20.7	103	70-130	
Chloroform	ug/L	20	20.1	100	70-130	
Tetrachloroethene	ug/L	20	20.2	101	70-130	
Trichloroethene	ug/L	20	20.1	101	70-130	
Vinyl chloride	ug/L	20	19.4	97	66-140	
1,2-Dichloroethane-d4 (S)	%			106	70-130	
4-Bromofluorobenzene (S)	%			99	70-130	
Toluene-d8 (S)	%			99	70-130	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 5025717 5025718

Parameter	Units	92831888001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
1,1-Dichloroethene	ug/L	ND	20	20	ND	ND	101	110	64-162		
1,2-Dichloroethane	ug/L	ND	20	20	ND	ND	102	104	68-145		
1,4-Dichlorobenzene	ug/L	ND	20	20	ND	ND	102	99	70-140		
2-Butanone (MEK)	ug/L	ND	40	40	ND	ND	99	108	57-156		
Benzene	ug/L	ND	20	20	ND	ND	98	96	68-144		
Carbon tetrachloride	ug/L	ND	20	20	ND	ND	95	91	70-147		
Chlorobenzene	ug/L	ND	20	20	ND	ND	106	107	70-143		
Chloroform	ug/L	ND	20	20	ND	ND	104	98	67-148		
Tetrachloroethene	ug/L	ND	20	20	ND	ND	88	82	70-145		
Trichloroethene	ug/L	ND	20	20	ND	ND	90	83	70-152		
Vinyl chloride	ug/L	ND	20	20	ND	ND	99	93	51-178		
1,2-Dichloroethane-d4 (S)	%						106	106	70-130		
4-Bromofluorobenzene (S)	%						97	98	70-130		
Toluene-d8 (S)	%						102	101	70-130		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 978748
QC Batch Method: EPA 3546
Analysis Method: EPA 8082A
Analysis Description: 8082 GCS PCB
Laboratory: Pace Analytical Services - Charlotte
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: 5033118 Matrix: Solid
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
PCB-1016 (Aroclor 1016)	ug/kg	ND	33.0	12/12/25 19:56	
PCB-1221 (Aroclor 1221)	ug/kg	ND	33.0	12/12/25 19:56	
PCB-1232 (Aroclor 1232)	ug/kg	ND	33.0	12/12/25 19:56	
PCB-1242 (Aroclor 1242)	ug/kg	ND	33.0	12/12/25 19:56	
PCB-1248 (Aroclor 1248)	ug/kg	ND	33.0	12/12/25 19:56	
PCB-1254 (Aroclor 1254)	ug/kg	ND	33.0	12/12/25 19:56	
PCB-1260 (Aroclor 1260)	ug/kg	ND	33.0	12/12/25 19:56	
Decachlorobiphenyl (S)	%	92	10-166	12/12/25 19:56	

LABORATORY CONTROL SAMPLE: 5033119

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
PCB-1016 (Aroclor 1016)	ug/kg	167	105	63	39-130	
PCB-1260 (Aroclor 1260)	ug/kg	167	111	67	44-130	
Decachlorobiphenyl (S)	%			70	10-166	

MATRIX SPIKE SAMPLE: 5033120

Parameter	Units	92834182001 Result	Spike Conc.	MS Result	MS % Rec	% Rec Limits	Qualifiers
PCB-1016 (Aroclor 1016)	ug/kg	ND	180	96.5	53	10-130	
PCB-1260 (Aroclor 1260)	ug/kg	ND	180	101	56	10-135	
Decachlorobiphenyl (S)	%				58	10-166	

SAMPLE DUPLICATE: 5033161

Parameter	Units	92834182002 Result	Dup Result	RPD	Qualifiers
PCB-1016 (Aroclor 1016)	ug/kg	ND	ND		
PCB-1221 (Aroclor 1221)	ug/kg	ND	ND		
PCB-1232 (Aroclor 1232)	ug/kg	ND	ND		
PCB-1242 (Aroclor 1242)	ug/kg	ND	ND		
PCB-1248 (Aroclor 1248)	ug/kg	ND	ND		
PCB-1254 (Aroclor 1254)	ug/kg	ND	ND		
PCB-1260 (Aroclor 1260)	ug/kg	ND	ND		
Decachlorobiphenyl (S)	%	67	64		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 977061
QC Batch Method: EPA 3510C
Analysis Method: EPA 8270E
Analysis Description: 8270E TCLP MSSV
Laboratory: Pace Analytical Services - Charlotte
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: 5021819 Matrix: Water
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
1,4-Dichlorobenzene	ug/L	ND	50.0	12/05/25 11:41	
2,4,5-Trichlorophenol	ug/L	ND	50.0	12/05/25 11:41	
2,4,6-Trichlorophenol	ug/L	ND	50.0	12/05/25 11:41	
2,4-Dinitrotoluene	ug/L	ND	50.0	12/05/25 11:41	
2-Methylphenol(o-Cresol)	ug/L	ND	50.0	12/05/25 11:41	
3&4-Methylphenol(m&p Cresol)	ug/L	ND	50.0	12/05/25 11:41	
Hexachloro-1,3-butadiene	ug/L	ND	50.0	12/05/25 11:41	
Hexachlorobenzene	ug/L	ND	50.0	12/05/25 11:41	
Hexachloroethane	ug/L	ND	50.0	12/05/25 11:41	
Nitrobenzene	ug/L	ND	50.0	12/05/25 11:41	
Pentachlorophenol	ug/L	ND	100	12/05/25 11:41	
Pyridine	ug/L	ND	50.0	12/05/25 11:41	
2,4,6-Tribromophenol (S)	%	69	10-166	12/05/25 11:41	
2-Fluorobiphenyl (S)	%	20	10-130	12/05/25 11:41	
2-Fluorophenol (S)	%	36	10-130	12/05/25 11:41	
Nitrobenzene-d5 (S)	%	46	10-133	12/05/25 11:41	
Phenol-d6 (S)	%	32	10-130	12/05/25 11:41	
Terphenyl-d14 (S)	%	117	10-193	12/05/25 11:41	

LABORATORY CONTROL SAMPLE: 5023787

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
1,4-Dichlorobenzene	ug/L	500	130	26	10-130	
2,4,5-Trichlorophenol	ug/L	500	251	50	36-150	
2,4,6-Trichlorophenol	ug/L	500	205	41	30-151	
2,4-Dinitrotoluene	ug/L	500	323	65	46-160	
2-Methylphenol(o-Cresol)	ug/L	500	280	56	32-130	
3&4-Methylphenol(m&p Cresol)	ug/L	500	277	55	29-130	
Hexachloro-1,3-butadiene	ug/L	500	157	31	10-130	
Hexachlorobenzene	ug/L	500	356	71	40-139	
Hexachloroethane	ug/L	500	109	22	10-130	
Nitrobenzene	ug/L	500	288	58	33-136	
Pentachlorophenol	ug/L	1000	325	33	19-156	
Pyridine	ug/L	500	224	45	10-130	
2,4,6-Tribromophenol (S)	%			70	10-166	
2-Fluorobiphenyl (S)	%			48	10-130	
2-Fluorophenol (S)	%			36	10-130	
Nitrobenzene-d5 (S)	%			52	10-133	
Phenol-d6 (S)	%			36	10-130	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

LABORATORY CONTROL SAMPLE: 5023787

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Terphenyl-d14 (S)	%			81	10-193	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 5023788 5023789

Parameter	Units	92831645001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
1,4-Dichlorobenzene	ug/L	ND	500	500	52.8	106	11	21	10-130	67	R1
2,4,5-Trichlorophenol	ug/L	ND	500	500	329	320	66	64	10-174	3	
2,4,6-Trichlorophenol	ug/L	ND	500	500	329	313	66	63	10-173	5	
2,4-Dinitrotoluene	ug/L	ND	500	500	412	390	82	78	29-168	5	
2-Methylphenol(o-Cresol)	ug/L	ND	500	500	288	275	58	55	10-130	4	
3&4-Methylphenol(m&p Cresol)	ug/L	ND	500	500	288	270	58	54	10-132	6	
Hexachloro-1,3-butadiene	ug/L	ND	500	500	58.6	123	12	25	10-130	71	R1
Hexachlorobenzene	ug/L	ND	500	500	433	394	87	79	27-145	10	
Hexachloroethane	ug/L	ND	500	500	35.2J	94.2	7	19	10-130		M1
Nitrobenzene	ug/L	ND	500	500	272	295	54	59	10-145	8	
Pentachlorophenol	ug/L	ND	1000	1000	805	742	80	74	10-178	8	
Pyridine	ug/L	ND	500	500	10.6J	15.7J	2	3	10-130		M1
2,4,6-Tribromophenol (S)	%						86	80	10-166		
2-Fluorobiphenyl (S)	%						36	42	10-130		
2-Fluorophenol (S)	%						39	35	10-130		
Nitrobenzene-d5 (S)	%						52	49	10-133		
Phenol-d6 (S)	%						34	31	10-130		
Terphenyl-d14 (S)	%						106	91	10-193		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 976274
QC Batch Method: SW-846
Analysis Method: SW-846
Analysis Description: Dry Weight/Percent Moisture
Laboratory: Pace Analytical Services - Charlotte

Associated Lab Samples: 92831784001, 92831784002

SAMPLE DUPLICATE: 5019250

Parameter	Units	92831438001 Result	Dup Result	RPD	Qualifiers
Percent Moisture	%	76.8	77.0	0	N2

SAMPLE DUPLICATE: 5019251

Parameter	Units	92831464003 Result	Dup Result	RPD	Qualifiers
Percent Moisture	%	28.3	29.4	4	N2

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 2654690
QC Batch Method: 1010B/ASTM D8175-18
Analysis Method: 1010B/ASTM D8175-18
Analysis Description: Wet Chemistry 1010B/ASTM D8175
Laboratory: Pace National - Mt. Juliet

Associated Lab Samples: 92831784001, 92831784002

LABORATORY CONTROL SAMPLE & LCSD: R4312564-1 R4312564-2

Parameter	Units	Spike Conc.	LCS Result	LCSD Result	LCS % Rec	LCSD % Rec	% Rec Limits	RPD	Max RPD	Qualifiers
Ignitability	deg F	126	127	128	101	101	96.5-103	0.786	10	

SAMPLE DUPLICATE: R4312564-3

Parameter	Units	L1923709-02 Result	Dup Result	RPD	Qualifiers
Ignitability	deg F	ND	DNI at 170	0.00	

SAMPLE DUPLICATE: R4312564-4

Parameter	Units	L1923841-01 Result	Dup Result	RPD	Qualifiers
Ignitability	deg F	ND	DNI at 170	0.00	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 2651835
QC Batch Method: 9012B
Analysis Method: EPA 9012B
Analysis Description: Wet Chemistry 9012B
Laboratory: Pace National - Mt. Juliet
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: R4310328-1 Matrix: Solid
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Cyanide, Reactive	mg/kg	ND	0.250	12/05/25 08:41	

LABORATORY CONTROL SAMPLE: R4310328-2

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Cyanide, Reactive	mg/kg	2.50	2.82	113	85.0-115	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: R4310328-3 R4310328-4

Parameter	Units	L1923773-01 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Cyanide, Reactive	mg/kg	ND	1.67	1.67	ND	ND	96.3	93.5	75.0-125	2.94	

MATRIX SPIKE SAMPLE: R4310328-6

Parameter	Units	L1923773-03 Result	Spike Conc.	MS Result	MS % Rec	% Rec Limits	Qualifiers
Cyanide, Reactive	mg/kg	ND	1.67	ND	74.6	75.0-125	ML

SAMPLE DUPLICATE: R4310328-5

Parameter	Units	L1923773-02 Result	Dup Result	RPD	Qualifiers
Cyanide, Reactive	mg/kg	ND	ND	0.00	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 2653397
QC Batch Method: 9030B
Analysis Method: EPA 9030B
Analysis Description: Wet Chemistry 9034-9030B
Laboratory: Pace National - Mt. Juliet
Associated Lab Samples: 92831784001, 92831784002

METHOD BLANK: R4312462-1 Matrix: Solid
Associated Lab Samples: 92831784001, 92831784002

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Sulfide, Reactive	mg/kg	ND	75.0	12/10/25 15:10	

LABORATORY CONTROL SAMPLE: R4312462-2

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Sulfide, Reactive	mg/kg	100	90.9	90.9	53.8-124	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: R4312462-3 R4312462-4

Parameter	Units	L1924831-13 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Sulfide, Reactive	mg/kg	34.8	100	100	ND	ND	131	115	10.0-136	10.3	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 2652830
QC Batch Method: 9045C/9045D
Analysis Method: EPA 9045D
Analysis Description: Wet Chemistry 9045D
Laboratory: Pace National - Mt. Juliet

Associated Lab Samples: 92831784001, 92831784002

LABORATORY CONTROL SAMPLE: R4310446-1

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
pH	Std. Units	10.0	9.99	99.9	99.0-101	

SAMPLE DUPLICATE: R4310446-3

Parameter	Units	L1924170-01 Result	Dup Result	RPD	Qualifiers
pH	Std. Units	8.29	8.31	0.241	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 2652830
QC Batch Method: EPA 9045D
Analysis Method: EPA 9045D
Analysis Description: Wet Chemistry 9045D
Laboratory: Pace National - Mt. Juliet

Associated Lab Samples: 92831784001, 92831784002

LABORATORY CONTROL SAMPLE: R4310446-1

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
pH	Std. Units	10.0	9.99	99.9	99.0-101	

SAMPLE DUPLICATE: R4310446-3

Parameter	Units	L1924170-01 Result	Dup Result	RPD	Qualifiers
pH	Std. Units	8.29	8.31	0.241	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 978219
QC Batch Method: EPA 9095B
Analysis Method: EPA 9095B
Analysis Description: 9095 PAINT FILTER LIQUID TEST
Laboratory: Pace Analytical Services - Asheville

Associated Lab Samples: 92831784001

SAMPLE DUPLICATE: 5029769

Parameter	Units	92832954001 Result	Dup Result	RPD	Qualifiers
Free Liquids		PASS	PASS		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92831784

QC Batch: 980078
QC Batch Method: EPA 9095B
Analysis Method: EPA 9095B
Analysis Description: 9095 PAINT FILTER LIQUID TEST
Laboratory: Pace Analytical Services - Asheville

Associated Lab Samples: 92831784002

SAMPLE DUPLICATE: 5039475

Parameter	Units	92834587001 Result	Dup Result	RPD	Qualifiers
Free Liquids		PASS	PASS		

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QUALIFIERS

Project: TCLP Testing
Pace Project No.: 92831784

DEFINITIONS

DF - Dilution Factor, if reported, represents the factor applied to the reported data due to dilution of the sample aliquot.

ND - Not Detected at or above adjusted reporting limit.

TNTC - Too Numerous To Count

J - Estimated concentration above the adjusted method detection limit and below the adjusted reporting limit.

MDL - Adjusted Method Detection Limit.

PQL - Practical Quantitation Limit.

RL - Reporting Limit - The lowest concentration value that meets project requirements for quantitative data with known precision and bias for a specific analyte in a specific matrix.

S - Surrogate

1,2-Diphenylhydrazine decomposes to and cannot be separated from Azobenzene using Method 8270. The result for each analyte is a combined concentration.

Consistent with EPA guidelines, unrounded data are displayed and have been used to calculate % recovery and RPD values.

LCS(D) - Laboratory Control Sample (Duplicate)

MS(D) - Matrix Spike (Duplicate)

DUP - Sample Duplicate

RPD - Relative Percent Difference

NC - Not Calculable.

SG - Silica Gel - Clean-Up

U - Indicates the compound was analyzed for, but not detected.

Acid preservation may not be appropriate for 2 Chloroethylvinyl ether.

A separate vial preserved to a pH of 4-5 is recommended in SW846 Chapter 4 for the analysis of Acrolein and Acrylonitrile by EPA Method 8260.

N-Nitrosodiphenylamine decomposes and cannot be separated from Diphenylamine using Method 8270. The result reported for each analyte is a combined concentration.

Reported results are not rounded until the final step prior to reporting. Therefore, calculated parameters that are typically reported as "Total" may vary slightly from the sum of the reported component parameters.

Pace Analytical is TNI accredited. Contact your Pace PM for the current list of accredited analytes.

TNI - The NELAC Institute.

WORKORDER QUALIFIERS

WO: 92831784

[1] All Reactive Cyanide results reported in the attached report were determined as totals using method 9012 B.

[1] All Reactive Sulfide results reported in the attached report were determined as totals using method 9034-9030B.

SAMPLE QUALIFIERS

Sample: 92831784001

[1] Wet Chemistry by Method 9045D - 6.67 at 19.2C

Sample: 92831784002

[1] Wet Chemistry by Method 9045D - 5.6 at 18.6C

Sample: R4310446-1

[1] Wet Chemistry by Method 9045D - 9.99 at 18.2C

Sample: R4310446-3

[1] Wet Chemistry by Method 9045D - 8.31 at 18.5C

Sample: L1924170-01

[1] Wet Chemistry by Method 9045D - 8.29 at 18.7C

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QUALIFIERS

Project: TCLP Testing
Pace Project No.: 92831784

ANALYTE QUALIFIERS

D3	Sample was diluted due to the presence of high levels of non-target analytes or other matrix interference.
H3	Sample was received or analysis requested beyond the recognized method holding time.
L1	Analyte recovery in the laboratory control sample (LCS) was above QC limits. Results for this analyte in associated samples may be biased high.
M1	Matrix spike recovery exceeded QC limits. Batch accepted based on laboratory control sample (LCS) recovery.
ML	Matrix spike recovery and/or matrix spike duplicate recovery was below laboratory control limits. Result may be biased low.
N2	The lab does not hold NELAC/TNI accreditation for this parameter but other accreditations/certifications may apply. A complete list of accreditations/certifications is available upon request.
R1	RPD value was outside control limits.

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QUALITY CONTROL DATA CROSS REFERENCE TABLE

Project: TCLP Testing
Pace Project No.: 92831784

Lab ID	Sample ID	QC Batch Method	QC Batch	Analytical Method	Analytical Batch
92831784001	**Grit Screenings**	3510C	2653712	EPA 8081B	2653712
92831784002	**Rags**	3510C	2653712	EPA 8081B	2653712
92831784001	**Grit Screenings**	8151A	2652617	EPA 8151A	2652617
92831784002	**Rags**	8151A	2652617	EPA 8151A	2652617
92831784001	**Grit Screenings**	EPA 3546	978748	EPA 8082A	978898
92831784002	**Rags**	EPA 3546	978748	EPA 8082A	978898
92831784001	**Grit Screenings**	EPA 3010	1149986	EPA 6010	1150081
92831784002	**Rags**	EPA 3010	1149986	EPA 6010	1150081
92831784001	**Grit Screenings**	EPA 7470	1150422	EPA 7470	1150442
92831784002	**Rags**	EPA 7470	1150422	EPA 7470	1150442
92831784001	**Grit Screenings**	EPA 3510C	977061	EPA 8270E	977219
92831784002	**Rags**	EPA 3510C	977061	EPA 8270E	977219
92831784001	**Grit Screenings**	EPA 8260D	977338		
92831784002	**Rags**	EPA 8260D	977338		
92831784001	**Grit Screenings**	SM 2540G-2011	976384		
92831784002	**Rags**	SM 2540G-2011	976384		
92831784001	**Grit Screenings**	SW-846	976274		
92831784002	**Rags**	SW-846	976274		
92831784001	**Grit Screenings**	1010B/ASTM D8175-18	2654690		
92831784002	**Rags**	1010B/ASTM D8175-18	2654690		
92831784001	**Grit Screenings**	9012B	2651835	EPA 9012B	2651835
92831784002	**Rags**	9012B	2651835	EPA 9012B	2651835
92831784001	**Grit Screenings**	9030B	2653397	EPA 9030B	2653397
92831784002	**Rags**	9030B	2653397	EPA 9030B	2653397
92831784001	**Grit Screenings**	9045C/9045D	2652830	EPA 9045D	2652830
92831784002	**Rags**	9045C/9045D	2652830	EPA 9045D	2652830
92831784001	**Grit Screenings**	EPA 9095B	978219		
92831784002	**Rags**	EPA 9095B	980078		

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Laboratory receiving samples:
Asheville ☐ Eden ☐ Greenwood ☐ Huntersville ☑ Raleigh ☐ Mechanicsville ☐ Atlanta ☐ Kernersville ☐

Sample Condition Upon Receipt

Client Name: Union County

Project #:

WO# : 92831784

92831784

Courier: ☐ Fed Ex ☐ UPS ☐ USPS ☐ Client ☐ Commercial ☑ Pace ☐ Other:____

Custody Seal Present? ☑ Yes ☐ No Seals Intact? ☑ Yes ☐ No ☐ N/A

Date/Initials Person Examining Contents: KTE 12/6

Packing Material: ☐ Bubble Wrap ☑ Bubble Bags ☐ None ☐ Other

Biological Tissue Frozen? ☐ Yes ☐ No ☑ N/A

Thermometer:
☐ IR Gun ID: 92T083

Type of Ice: ☑ Wet ☐ Blue ☐ None

Cooler Temp: 3.6 Correction Factor: Add/Subtract (°C) 0

Cooler Temp Corrected (°C): 3.6

Temp should be above freezing to 6°C
☐ Samples out of temp criteria. Samples on ice, cooling process has begun

USDA Regulated Soil (☐ N/A, water sample)
Did samples originate in a quarantine zone within the United States: CA, NY, or SC (check maps)? ☐ Yes ☑ No

Did samples originate from a foreign source (internationally, including Hawaii and Puerto Rico)? ☐ Yes ☑ No

				Comments/Discrepancy:
Chain of Custody Present?	☑ Yes	☐ No	☐ N/A	1.
Samples Arrived within Hold Time?	☑ Yes	☐ No	☐ N/A	2.
Short Hold Time Analysis (<72 hr.)?	☐ Yes	☑ No	☐ N/A	3.
Rush Turn Around Time Requested?	☐ Yes	☑ No	☐ N/A	4.
Sufficient Volume?	☑ Yes	☐ No	☐ N/A	5.
Correct Containers Used?	☑ Yes	☐ No	☐ N/A	6.
-Pace Containers Used?	☑ Yes	☐ No	☐ N/A	
Containers Intact?	☑ Yes	☐ No	☐ N/A	7.
Dissolved analysis: Samples Field Filtered?	☐ Yes	☑ No	☐ N/A	8.
Sample Labels Match COC?	☑ Yes	☐ No	☐ N/A	9.
-Includes Date/Time/ID/Analysis Matrix: SS				
Headspace in VOA Vials (>5-6mm)?	☐ Yes	☐ No	☑ N/A	10.
Trip Blank Present?	☐ Yes	☑ No	☐ N/A	11.
Trip Blank Custody Seals Present?	☐ Yes	☐ No	☑ N/A	

COMMENTS/SAMPLE DISCREPANCY

Field Data Required? ☐ Yes ☐ No

Lot ID of split containers:

CLIENT NOTIFICATION/RESOLUTION

Person contacted: Date/Time:

Project Manager SCURF Review: Date:

Project Manager SRF Review: Date:

Pace

DC#_Title: ENV-FRM-HUN1-0083 v05_Sample Condition Upon Receipt

Effective Date: 05/24/2024

WO#: 92831784

PM: SK Due Date: 12/15/25

CLIENT: 92-Union Cou

*Check mark top half of box if pH and/or dechlorination is verified and within the acceptance range for preservation samples.
Exceptions: VOA, Coliform, TOC, Oil and Grease, DRO/8015 (water) DOC, LLHg
**Bottom half of box is to list number of bottles
***Check all unpreserved Nitrates for chlorine

Project #

Laboratory Receiving Location: Asheville ☐ Eden ☐ Greenwood ☐ Huntersville ☑ Raleigh ☐ Mechanicsville ☐ Atlanta ☐ Kernersville ☐

Client Union County Profile/E2 (Circle one) 3325351 Notes

Item#	BP4U-125 mL Plastic Unpreserved (N/A) (CL)	BP3U-250 mL Plastic Unpreserved (N/A)	BP2U-500 mL Plastic Unpreserved (N/A)	BP1U-1 liter Plastic Unpreserved (N/A)	AG2U	BP4S-125 mL Plastic H2SO4 (pH < 2) (CL)	BP3N-250 mL plastic HNO3 (pH < 2)	BP4Z-125 mL Plastic Zn Acetate & NaOH (>9)	BP4B-125 mL Plastic NaOH (pH > 12) (CL)	WGFU-Wide-mouthed Glass jar Unpreserved	AG1U-1 liter Amber Unpreserved (N/A) (CL)	AG1H-1 liter Amber HCl (pH < 2)	AG3U-250 mL Amber Unpreserved (N/A) (CL)	AG1S-1 liter Amber H2SO4 (pH < 2)	AG3S-250 mL Amber H2SO4 (pH < 2)	DG9A-40 mL Amber NH4Cl (N/A)(CL)	DG9H-40 mL VOA HCl (N/A)	VG9T-40 mL VOA Na2S2O3 (N/A)	VG9U-40 mL VOA Unpreserved (N/A)	DG9V-40 mL VOA H3PO4 (N/A)	KP7U-50 mL Plastic Unpreserved (N/A)	V/GK (3 vials per kit)-VPH/Gas kit (N/A)	SP5T-125 mL Sterile Plastic (N/A - lab)	SP2T-250 mL Sterile Plastic (N/A - lab)		BP3R-250 mL Plastic (NH4)2SO4 (9.3-9.7)	AG0U-100 mL Amber Unpreserved (N/A) (CL)	VSGU-20 mL Scintillation vials (N/A)	DG9U-40 mL Amber Unpreserved vials (N/A)
CC																														
1					3					1			2																	
2					3					1			2																	
3																														
4																														
5																														
6																														
7																														
8																														
9																														
10																														
11																														
12																														

pH Adjustment Log for Preserved Samples

Sample ID	Type of Preservative	pH upon receipt	Date preservation adjusted	Time preservation adjusted	Amount of Preservative added	Lot #

Note: Whenever there is a discrepancy affecting North Carolina compliance samples, a copy of this form will be sent to the North Carolina DENR Certification Office (i.e. Out of hold, incorrect preservative, out of temp, incorrect containers.

Pace® Location Requested (City/State):
Pace Analytical Kernersville, NC
1377 South Park Dr., Kernersville, NC 27284

CHAIN-OF-CUSTODY Analytical Request Document

Chain-of-Custody is a LEGAL DOCUMENT - Complete all relevant fields

LAB USE ONLY- Affix Workorder/Login Label Here

Scan QR Code for instructions

Company Name:	Union County Public Works	Contact/Report To:	Keith Purgason
Street Address:	8299 Kensington Drive Waxhaw, NC 28173	Phone #:	(704)318-7177
		E-Mail:	keith.purgason@unioncountync.gov
		Cc E-Mail:	
Customer Project #:			
Project Name:	TCLP Testing	Invoice To:	AP County
		Invoice E-Mail:	water.ap@unioncountync.gov
Site Collection Info/Facility ID (as applicable):		Purchase Order # (if applicable):	
		Quote #:	

Time Zone Collected: [ ] AK [ ] PT [ ] MT [ ] CT [ ] ET

County / State origin of sample(s): North Carolina

Data Deliverables: [ ] Level II [ ] Level III [ ] Level IV [ ] EQUIS [ ] Other

Regulatory Program (DW, RCRA, etc.) as applicable: Reportable [ ] Yes [ ] No

Rush (Pre-approval required): [ ] Same Day [ ] 1 Day [ ] 2 Day [ ] 3 Day [ ] Other _____

DW PWSID # or WW Permit # as applicable:

Date Results Requested:

Field Filtered (if applicable): [ ] Yes [ ] No

Analysis:

* Matrix Codes (Insert in Matrix box below): Drinking Water (DW), Ground Water (GW), Waste Water (WW), Product (P), Soil/Solid (SS), Oil (OL), Wipe (WP), Tissue (TS), Bioassay (B), Vapor (V), Surface Water (SW),Sediment (SED), Sludge (SL), Caulk (CK), Leachate (LL), Biosolid (BS), Other (OT)

Customer Sample ID	Matrix *	Comp / Grab	Composite Start Date	Composite Start Time	Collected or Composite End Date	Collected or Composite End Time	# Cont.	Res. Chlorine Results	Res. Chlorine Units	8082 Total PCB/% Solids	9095 Paint Filter Liquid Test	RCI - PN	TCLP 8260/8270/8081	TCLP Herbicides by 8151 - PN	TCLP RCRA 8 Metals - OB	Sample Comment
Grit Screenings	SL	G			12/01/25	0715	6			X	X	X	X	X	X	
Rags	SL	G			12/01/25	0730	6			X	X	X	X	X	X	

Specify Container Size **

Identify Container Preservative Type***

**Container Size: (1) 1L, (2) 500mL, (3) 250mL, (4) 125mL, (5) 100mL, (6) 40mL vial, (7) EnCore, (8) TerraCore, (9) 90mL, (10) Other

*** Preservative Types: (1) None, (2) HNO3, (3) H2SO4, (4) HCl, (5) NaOH, (6) Zn Acetate, (7) NaHSO4, (8) Sod. Thiosulfate, (9) Ascorbic Acid, (10) MeOH, (11) Other

Lab Use Only

Proj. Mgr: **Stephanie Knott**

AcctNum / Client ID:

Table #:

Profile / Template: **16076**

Prelog / Bottle Ord. ID: **EZ 3325351**

Preservation non-conformance identified for sample.

Additional Instructions from Pace®:

Collected By: (Printed Name) JULIAN COLEY

Signature: J. H Coley

Customer Remarks / Special Conditions / Possible Hazards:

# Coolers:	Thermometer ID:	Correction Factor (°C):	Obs. Temp. (°C)	Corrected Temp. (°C)	On Ice:
1	92T083	0	3.6	3.6	

Relinquished by/Company: (Signature)	Date/Time:	Received by/Company: (Signature)	Date/Time:	Tracking Number:
J. H Coley / UCW	12/01/25 1046		12/1/25 1050	
Relinquished by/Company: (Signature)	Date/Time: 12/1/25 c	Received by/Company: (Signature) Kyle Tooley/PACE	Date/Time: 12/01/25 1235	Delivered by: [ ] In- Person [ ] Courier [ ] FedEx [ ] UPS [ ] Other
Relinquished by/Company: (Signature)	Date/Time:	Received by/Company: (Signature)	Date/Time:	
Relinquished by/Company: (Signature)	Date/Time:	Received by/Company: (Signature)	Date/Time:	Page: 1 of 1

Submitting a sample via this chain of custody constitutes acknowledgment and acceptance of the Pace® Terms and Conditions found at https://www.pacelabs.com/resource-library/resource/pace-terms-and-conditions/

ENV-FRM-CORQ-0019_v02_110123 ©

Page 33 of 300

Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

July 07, 2025

Keith Purgason
Union County Public Works
8299 Kensington Drive
Waxhaw, NC 28173

RE: Project: TCLP Testing
Pace Project No.: 92801413

Dear Keith Purgason:

Enclosed are the analytical results for sample(s) received by the laboratory on June 10, 2025. The results relate only to the samples included in this report. Results reported herein conform to the applicable TNI/NELAC Standards and the laboratory's Quality Manual, where applicable, unless otherwise noted in the body of the report.

The test results provided in this final report were generated by each of the following laboratories within the Pace Network:

- Pace National - Mt. Juliet
- Pace Analytical Services - Asheville
- Pace Analytical Services - Charlotte
- Pace Analytical Services - Ormond Beach

If you have any questions concerning this report, please feel free to contact me.

Sincerely,

Stephanie Knott

Stephanie Knott
stephanie.knott@pacelabs.com
704-977-0981
Project Manager

Enclosures

cc: Julian Coley
Jonathan Jordan
Kevin Merrill

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

CERTIFICATIONS

Project: TCLP Testing
Pace Project No.: 92801413

Pace Analytical Services Ormond Beach
8 East Tower Circle, Ormond Beach, FL 32174
Alaska DEC- CS/UST/LUST
Alabama Certification #: 41320
California Certification# 3096
Colorado Certification: FL NELAC Reciprocity
Connecticut Certification #: PH-0216
Delaware Certification: FL NELAC Reciprocity
DoD-ANAB #:ADE-3199
Florida Certification #: E83079
Georgia Certification #: 955
Guam Certification: FL NELAC Reciprocity
Hawaii Certification: FL NELAC Reciprocity
Illinois Certification #: 200068
Indiana Certification: FL NELAC Reciprocity
Kansas Certification #: E-10383
Kentucky Certification #: 90050
Louisiana Certification #: FL NELAC Reciprocity
Louisiana Environmental Certificate #: 05007
Maine Certification #: FL01264
Maryland Certification: #346
Massachusetts Certification #: M-FL1264
Michigan Certification #: 9911
Mississippi Certification: FL NELAC Reciprocity
Missouri Certification #: 236
Montana Certification #: Cert 0074
Nebraska Certification: NE-OS-28-14
Nevada Certification: FL NELAC Reciprocity
New Hampshire Certification #: 2958
New Jersey Certification #: FL022
New York Certification #: 11608
North Carolina Environmental Certificate #: 667
North Carolina Certification #: 12710
North Dakota Certification #: R-216
Ohio DEP 87780
Oklahoma Certification #: D9947
Pennsylvania Certification #: 68-00547
Puerto Rico Certification #: FL01264
South Carolina Certification: #96042001
Tennessee Certification #: TN02974
Texas Certification: FL NELAC Reciprocity
US Virgin Islands Certification: FL NELAC Reciprocity
Utah
Utah FL NELAC Reciprocity
Virginia Environmental Certification #: 460165
Washington Certification #: C955
West Virginia Certification #: 9962C
Wisconsin Certification #: 399079670
Wyoming (EPA Region 8): FL NELAC Reciprocity

Pace Analytical Services National
12065 Lebanon Road, Mt. Juliet, TN 37122
Alabama Certification #: 40660
Alaska Certification 17-026
Arizona Certification #: AZ0612
Arkansas Certification #: 88-0469
California Certification #: 2932
Canada Certification #: 1461.01
Colorado Certification #: TN00003
Connecticut Certification #: PH-0197
DOD Certification: #1461.01
EPA# TN00003
Florida Certification #: E87487
Georgia DW Certification #: 923
Georgia Certification: NELAP
Idaho Certification #: TN00003
Illinois Certification #: 200008
Indiana Certification #: C-TN-01
Iowa Certification #: 364
Kansas Certification #: E-10277
Kentucky UST Certification #: 16
Kentucky Certification #: 90010
Louisiana Certification #: AI30792
Louisiana DW Certification #: LA180010
Maine Certification #: TN0002
Maryland Certification #: 324
Massachusetts Certification #: M-TN003
Michigan Certification #: 9958
Minnesota Certification #: 047-999-395
Mississippi Certification #: TN00003
Missouri Certification #: 340
Montana Certification #: CERT0086
Nebraska Certification #: NE-OS-15-05
Nevada Certification #: TN-03-2002-34
New Hampshire Certification #: 2975
New Jersey Certification #: TN002
New Mexico DW Certification
New York Certification #: 11742
North Carolina Aquatic Toxicity Certification #: 41
North Carolina Drinking Water Certification #: 21704
North Carolina Environmental Certificate #: 375
North Dakota Certification #: R-140
Ohio VAP Certification #: CL0069
Oklahoma Certification #: 9915
Oregon Certification #: TN200002
Pennsylvania Certification #: 68-02979
Rhode Island Certification #: LAO00356
South Carolina Certification #: 84004
South Dakota Certification
Tennessee DW/Chem/Micro Certification #: 2006
Texas Certification #: T 104704245-17-14

REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

CERTIFICATIONS

Project: TCLP Testing
Pace Project No.: 92801413

Pace Analytical Services National

Texas Mold Certification #: LAB0152
USDA Soil Permit #: P330-15-00234
Utah Certification #: TN00003
Virginia Certification #: VT2006
Vermont Dept. of Health: ID# VT-2006
Virginia Certification #: 460132
Washington Certification #: C847
West Virginia Certification #: 233
Wisconsin Certification #: 998093910
Wyoming UST Certification #: via A2LA 2926.01
A2LA-ISO 17025 Certification #: 1461.01
A2LA-ISO 17025 Certification #: 1461.02
AIHA-LAP/LLC EMLAP Certification #:100789

Pace Analytical Services Charlotte

South Carolina Laboratory ID: 99006
9800 Kincey Ave. Ste 100, Huntersville, NC 28078
North Carolina Drinking Water Certification #: 37706
North Carolina Field Services Certification #: 5342
North Carolina Wastewater Certification #: 12
South Carolina Laboratory ID: 99006
South Carolina Certification #: 99006001
South Carolina Drinking Water Cert. #: 99006003
Florida/NELAP Certification #: E87627
Kentucky UST Certification #: 84
Louisiana DoH Drinking Water #: LA029
Virginia/VELAP Certification #: 460221

Pace Analytical Services Asheville

2225 Riverside Drive, Asheville, NC 28804
Florida/NELAP Certification #: E87648
North Carolina Drinking Water Certification #: 37712
North Carolina Wastewater Certification #: 40
South Carolina Laboratory ID: 99030
South Carolina Certification #: 99030001
Virginia/VELAP Certification #: 460222

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9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

SAMPLE ANALYTE COUNT

Project: TCLP Testing
Pace Project No.: 92801413

Lab ID	Sample ID	Method	Analysts	Analytes Reported	Laboratory
92801413001	**UC12-BFP-1-CAKE**	EPA 8151A	HMH	3	PAN
		EPA 8081B	SEM	9	PASI-C
		EPA 8082A	BAJ	8	PASI-C
		EPA 6010	JMP2	7	PASI-O
		EPA 7470	JNK	1	PASI-O
		EPA 8270E	ICO	18	PASI-C
		EPA 8260D	SAS	14	PASI-C
		SM 2540G-2011	KDF	1	PASI-C
		SW-846	KDF	1	PASI-C
		EPA 9095B	SMS	1	PASI-A

PAN = Pace National - Mt. Juliet
PASI-A = Pace Analytical Services - Asheville
PASI-C = Pace Analytical Services - Charlotte
PASI-O = Pace Analytical Services - Ormond Beach

REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92801413

Sample: UC12-BFP-1-CAKE **Lab ID: 92801413001** Collected: 06/10/25 06:45 Received: 06/10/25 12:55 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
Chlorinated Herb. (GC) 8151A	Analytical Method: EPA 8151A Preparation Method: 8151A Leachate Method/Date: 1311; 06/12/25 18:20 Initial pH: 6.54; Final pH: 5.02 Pace National - Mt. Juliet							
2,4,5-TP (Silvex)	ND	mg/L	0.00200	1	06/19/25 16:48	06/20/25 22:18	93-72-1	
2,4-D	ND	mg/L	0.00200	1	06/19/25 16:48	06/20/25 22:18	94-75-7	
Surrogates								
2,4-DCAA (S)	90.0	%	14.0-158	1	06/19/25 16:48	06/20/25 22:18	19719-28-9	
8081 TCLP Pesticides RVE	Analytical Method: EPA 8081B Preparation Method: EPA 3510C Leachate Method/Date: EPA 1311; 06/13/25 16:39 Initial pH: 6.9; Final pH: 5 Pace Analytical Services - Charlotte							
gamma-BHC (Lindane)	ND	ug/L	0.50	1	06/18/25 22:01	06/19/25 07:52	58-89-9	
Chlordane (Technical)	ND	ug/L	3.0	1	06/18/25 22:01	06/19/25 07:52	57-74-9	
Endrin	ND	ug/L	0.50	1	06/18/25 22:01	06/19/25 07:52	72-20-8	
Heptachlor	ND	ug/L	0.50	1	06/18/25 22:01	06/19/25 07:52	76-44-8	
Heptachlor epoxide	ND	ug/L	0.50	1	06/18/25 22:01	06/19/25 07:52	1024-57-3	
Methoxychlor	ND	ug/L	1000	1	06/18/25 22:01	06/19/25 07:52	72-43-5	
Toxaphene	ND	ug/L	3.0	1	06/18/25 22:01	06/19/25 07:52	8001-35-2	
Surrogates								
Decachlorobiphenyl (S)	92	%	10-200	1	06/18/25 22:01	06/19/25 07:52	2051-24-3	
Tetrachloro-m-xylene (S)	45	%	10-190	1	06/18/25 22:01	06/19/25 07:52	877-09-8	
8082 GCS PCB	Analytical Method: EPA 8082A Preparation Method: EPA 3546 Pace Analytical Services - Charlotte							
PCB-1016 (Aroclor 1016)	ND	ug/kg	209	1	06/26/25 16:45	06/27/25 08:53	12674-11-2	
PCB-1221 (Aroclor 1221)	ND	ug/kg	209	1	06/26/25 16:45	06/27/25 08:53	11104-28-2	
PCB-1232 (Aroclor 1232)	ND	ug/kg	209	1	06/26/25 16:45	06/27/25 08:53	11141-16-5	
PCB-1242 (Aroclor 1242)	ND	ug/kg	209	1	06/26/25 16:45	06/27/25 08:53	53469-21-9	
PCB-1248 (Aroclor 1248)	ND	ug/kg	209	1	06/26/25 16:45	06/27/25 08:53	12672-29-6	
PCB-1254 (Aroclor 1254)	ND	ug/kg	209	1	06/26/25 16:45	06/27/25 08:53	11097-69-1	
PCB-1260 (Aroclor 1260)	ND	ug/kg	209	1	06/26/25 16:45	06/27/25 08:53	11096-82-5	
Surrogates								
Decachlorobiphenyl (S)	38	%	10-166	1	06/26/25 16:45	06/27/25 08:53	2051-24-3	
6010 MET ICP, TCLP	Analytical Method: EPA 6010 Preparation Method: EPA 3010 Leachate Method/Date: EPA 1311; 06/12/25 14:21 Pace Analytical Services - Ormond Beach							
Arsenic	ND	mg/L	0.10	1	06/13/25 09:55	06/16/25 09:12	7440-38-2	
Barium	ND	mg/L	0.10	1	06/13/25 09:55	06/16/25 09:12	7440-39-3	
Cadmium	ND	mg/L	0.010	1	06/13/25 09:55	06/16/25 09:12	7440-43-9	
Chromium	ND	mg/L	0.050	1	06/13/25 09:55	06/16/25 09:12	7440-47-3	
Lead	**0.10**	mg/L	0.10	1	06/13/25 09:55	06/16/25 09:12	7439-92-1	
Selenium	ND	mg/L	0.15	1	06/13/25 09:55	06/16/25 09:12	7782-49-2	
Silver	ND	mg/L	0.050	1	06/13/25 09:55	06/16/25 09:12	7440-22-4	

REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92801413

Sample: UC12-BFP-1-CAKE **Lab ID: 92801413001** Collected: 06/10/25 06:45 Received: 06/10/25 12:55 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
7470 Mercury, TCLP	Analytical Method: EPA 7470 Preparation Method: EPA 7470 Leachate Method/Date: EPA 1311; 06/12/25 14:21 Pace Analytical Services - Ormond Beach							
Mercury	ND	mg/L	0.0020	1	06/18/25 09:29	06/18/25 12:56	7439-97-6	
8270E TCLP RVE	Analytical Method: EPA 8270E Preparation Method: EPA 3510C Leachate Method/Date: EPA 1311; 06/13/25 16:39 Initial pH: 6.9; Final pH: 5 Pace Analytical Services - Charlotte							
1,4-Dichlorobenzene	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	106-46-7	
2,4-Dinitrotoluene	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	121-14-2	
Hexachloro-1,3-butadiene	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	87-68-3	
Hexachlorobenzene	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	118-74-1	
Hexachloroethane	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	67-72-1	
2-Methylphenol(o-Cresol)	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	95-48-7	
3&4-Methylphenol(m&p Cresol)	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	15831-10-4	
Nitrobenzene	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	98-95-3	
Pentachlorophenol	ND	ug/L	100	1	06/16/25 16:28	06/17/25 12:57	87-86-5	
Pyridine	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	110-86-1	M1
2,4,5-Trichlorophenol	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	95-95-4	
2,4,6-Trichlorophenol	ND	ug/L	50.0	1	06/16/25 16:28	06/17/25 12:57	88-06-2	
Surrogates								
Nitrobenzene-d5 (S)	33	%	10-133	1	06/16/25 16:28	06/17/25 12:57	4165-60-0	
2-Fluorobiphenyl (S)	27	%	10-130	1	06/16/25 16:28	06/17/25 12:57	321-60-8	
Terphenyl-d14 (S)	91	%	10-193	1	06/16/25 16:28	06/17/25 12:57	1718-51-0	
Phenol-d6 (S)	32	%	10-130	1	06/16/25 16:28	06/17/25 12:57	13127-88-3	
2-Fluorophenol (S)	32	%	10-130	1	06/16/25 16:28	06/17/25 12:57	367-12-4	
2,4,6-Tribromophenol (S)	71	%	10-166	1	06/16/25 16:28	06/17/25 12:57	118-79-6	
8260D MSV TCLP	Analytical Method: EPA 8260D Leachate Method/Date: EPA 1311; 06/17/25 10:42 Pace Analytical Services - Charlotte							
Benzene	ND	ug/L	100	20		06/18/25 21:26	71-43-2	
2-Butanone (MEK)	ND	ug/L	200	20		06/18/25 21:26	78-93-3	
Carbon tetrachloride	ND	ug/L	100	20		06/18/25 21:26	56-23-5	
Chlorobenzene	ND	ug/L	100	20		06/18/25 21:26	108-90-7	
Chloroform	ND	ug/L	100	20		06/18/25 21:26	67-66-3	
1,4-Dichlorobenzene	ND	ug/L	100	20		06/18/25 21:26	106-46-7	
1,2-Dichloroethane	ND	ug/L	100	20		06/18/25 21:26	107-06-2	
1,1-Dichloroethene	ND	ug/L	100	20		06/18/25 21:26	75-35-4	
Tetrachloroethene	ND	ug/L	100	20		06/18/25 21:26	127-18-4	
Trichloroethene	ND	ug/L	100	20		06/18/25 21:26	79-01-6	
Vinyl chloride	ND	ug/L	100	20		06/18/25 21:26	75-01-4	
Surrogates								
1,2-Dichloroethane-d4 (S)	105	%	70-130	20		06/18/25 21:26	17060-07-0	
Toluene-d8 (S)	101	%	70-130	20		06/18/25 21:26	2037-26-5	
4-Bromofluorobenzene (S)	97	%	70-130	20		06/18/25 21:26	460-00-4	

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(704)875-9092

ANALYTICAL RESULTS

Project: TCLP Testing
Pace Project No.: 92801413

Sample: UC12-BFP-1-CAKE **Lab ID: 92801413001** Collected: 06/10/25 06:45 Received: 06/10/25 12:55 Matrix: Solid

Results reported on a "dry weight" basis and are adjusted for percent moisture, sample size and any dilutions.

Parameters	Results	Units	Report Limit	DF	Prepared	Analyzed	CAS No.	Qual
2540G Total Percent Solids	Analytical Method: SM 2540G-2011 Pace Analytical Services - Charlotte							
Total Solids	**15.8**	%	0.10	1		06/10/25 17:20		
Percent Moisture	Analytical Method: SW-846 Pace Analytical Services - Charlotte							
Percent Moisture	**84.2**	%	0.10	1		06/10/25 17:13		N2
9095 Paint Filter Liquid Test	Analytical Method: EPA 9095B Pace Analytical Services - Asheville							
Free Liquids	**PASS**		1.0	1		06/11/25 16:16		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 2540308
QC Batch Method: 8151A
Analysis Method: EPA 8151A
Analysis Description: Chlorinated Herb. (GC) 8151A
Laboratory: Pace National - Mt. Juliet
Associated Lab Samples: 92801413001

METHOD BLANK: R4234617-1 Matrix: Solid
Associated Lab Samples: 92801413001

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
2,4,5-TP (Silvex)	mg/L	ND	0.00200	06/20/25 18:57	
2,4-D	mg/L	ND	0.00200	06/20/25 18:57	
2,4-DCAA (S)	%	76	14.0-158	06/20/25 18:57	

LABORATORY CONTROL SAMPLE: R4234617-2

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
2,4,5-TP (Silvex)	mg/L	0.0250	0.0217	86.8	50.0-125	
2,4-D	mg/L	0.0250	0.0223	89.2	50.0-120	
2,4-DCAA (S)	%			85.0	14.0-158	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: R4234617-3 R4234617-4

Parameter	Units	L1869745-01 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
2,4,5-TP (Silvex)	mg/L	ND	0.0250	0.0250	ND	ND	83.2	83.6	50.0-125	0.480	
2,4-D	mg/L	ND	0.0250	0.0250	ND	ND	90.0	82.0	50.0-120	9.30	
2,4-DCAA (S)	%						83.0	85.0	14.0-158		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 1106767
QC Batch Method: EPA 7470
Analysis Method: EPA 7470
Analysis Description: 7470 Mercury TCLP
Laboratory: Pace Analytical Services - Ormond Beach
Associated Lab Samples: 92801413001

METHOD BLANK: 6064075 Matrix: Water
Associated Lab Samples: 92801413001

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Mercury	mg/L	ND	0.00020	06/18/25 12:40	

LABORATORY CONTROL SAMPLE: 6071618

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Mercury	mg/L	0.002	0.0020	101	80-120	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 6071619 6071620

Parameter	Units	92801151001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Mercury	mg/L	ND	0.02	0.02	0.020	0.020	101	98	75-125	4	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 1105637
QC Batch Method: EPA 3010
Analysis Method: EPA 6010
Analysis Description: 6010 MET TCLP
Laboratory: Pace Analytical Services - Ormond Beach
Associated Lab Samples: 92801413001

METHOD BLANK: 6064075 Matrix: Water
Associated Lab Samples: 92801413001

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Arsenic	mg/L	ND	0.010	06/20/25 07:24	
Barium	mg/L	ND	0.010	06/20/25 07:24	
Cadmium	mg/L	ND	0.0010	06/20/25 07:24	
Chromium	mg/L	ND	0.0050	06/20/25 07:24	
Lead	mg/L	ND	0.010	06/20/25 07:24	
Selenium	mg/L	ND	0.015	06/20/25 07:24	
Silver	mg/L	ND	0.0050	06/20/25 07:24	

LABORATORY CONTROL SAMPLE: 6065993

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Arsenic	mg/L	0.25	0.27	107	80-120	
Barium	mg/L	0.25	0.24	97	80-120	
Cadmium	mg/L	0.025	0.024	97	80-120	
Chromium	mg/L	0.25	0.25	98	80-120	
Lead	mg/L	0.25	0.23	94	80-120	
Selenium	mg/L	0.25	0.29	116	80-120	
Silver	mg/L	0.025	0.028	111	80-120	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 6065994 6065995

Parameter	Units	92801151001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Arsenic	mg/L	ND	2.5	2.5	2.5	2.5	99	99	75-125	0	
Barium	mg/L	ND	2.5	2.5	2.6	2.6	102	102	75-125	1	
Cadmium	mg/L	ND	0.25	0.25	0.25	0.25	99	100	75-125	1	
Chromium	mg/L	ND	2.5	2.5	2.5	2.5	100	100	75-125	1	
Lead	mg/L	ND	2.5	2.5	2.5	2.5	99	99	75-125	0	
Selenium	mg/L	ND	2.5	2.5	2.3	2.4	92	94	75-125	2	
Silver	mg/L	ND	0.25	0.25	0.26	0.26	102	103	75-125	1	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 942690
QC Batch Method: EPA 8260D
Analysis Method: EPA 8260D
Analysis Description: 8260D MSV TCLP
Laboratory: Pace Analytical Services - Charlotte

Associated Lab Samples: 92801413001

METHOD BLANK: 4844488 Matrix: Water
Associated Lab Samples: 92801413001

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
1,1-Dichloroethene	ug/L	ND	5.0	06/18/25 10:58	
1,2-Dichloroethane	ug/L	ND	5.0	06/18/25 10:58	
1,4-Dichlorobenzene	ug/L	ND	5.0	06/18/25 10:58	
2-Butanone (MEK)	ug/L	ND	10.0	06/18/25 10:58	
Benzene	ug/L	ND	5.0	06/18/25 10:58	
Carbon tetrachloride	ug/L	ND	5.0	06/18/25 10:58	
Chlorobenzene	ug/L	ND	5.0	06/18/25 10:58	
Chloroform	ug/L	ND	5.0	06/18/25 10:58	
Tetrachloroethene	ug/L	ND	5.0	06/18/25 10:58	
Trichloroethene	ug/L	ND	5.0	06/18/25 10:58	
Vinyl chloride	ug/L	ND	5.0	06/18/25 10:58	
1,2-Dichloroethane-d4 (S)	%	100	70-130	06/18/25 10:58	
4-Bromofluorobenzene (S)	%	96	70-130	06/18/25 10:58	
Toluene-d8 (S)	%	100	70-130	06/18/25 10:58	

LABORATORY CONTROL SAMPLE: 4844487

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
1,1-Dichloroethene	ug/L	20	20.5	103	69-131	
1,2-Dichloroethane	ug/L	20	20.3	102	70-130	
1,4-Dichlorobenzene	ug/L	20	19.4	97	70-130	
2-Butanone (MEK)	ug/L	40	40.9	102	67-133	
Benzene	ug/L	20	20.2	101	70-130	
Carbon tetrachloride	ug/L	20	18.5	93	70-130	
Chlorobenzene	ug/L	20	19.7	99	70-130	
Chloroform	ug/L	20	19.1	96	70-130	
Tetrachloroethene	ug/L	20	18.6	93	70-130	
Trichloroethene	ug/L	20	19.6	98	70-130	
Vinyl chloride	ug/L	20	17.3	87	66-140	
1,2-Dichloroethane-d4 (S)	%			102	70-130	
4-Bromofluorobenzene (S)	%			100	70-130	
Toluene-d8 (S)	%			100	70-130	

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 4844489 4844490

Parameter	Units	92802308001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
1,1-Dichloroethene	ug/L	ND	20	20	ND	ND	92	93	64-162		
1,2-Dichloroethane	ug/L	ND	20	20	ND	ND	95	92	68-145		
1,4-Dichlorobenzene	ug/L	ND	20	20	ND	ND	126	111	70-140		
2-Butanone (MEK)	ug/L	ND	40	40	ND	ND	106	110	57-156		
Benzene	ug/L	ND	20	20	ND	ND	103	106	68-144		
Carbon tetrachloride	ug/L	ND	20	20	ND	ND	95	92	70-147		
Chlorobenzene	ug/L	ND	20	20	ND	ND	112	106	70-143		
Chloroform	ug/L	ND	20	20	ND	ND	101	104	67-148		
Tetrachloroethene	ug/L	ND	20	20	ND	ND	92	95	70-145		
Trichloroethene	ug/L	ND	20	20	ND	ND	90	90	70-152		
Vinyl chloride	ug/L	ND	20	20	ND	ND	82	71	51-178		
1,2-Dichloroethane-d4 (S)	%						101	103	70-130		
4-Bromofluorobenzene (S)	%						99	100	70-130		
Toluene-d8 (S)	%						100	101	70-130		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 942664
QC Batch Method: EPA 3510C
Analysis Method: EPA 8081B
Analysis Description: 8081 TCLP Pesticides RV
Laboratory: Pace Analytical Services - Charlotte
Associated Lab Samples: 92801413001

METHOD BLANK: 4838798 Matrix: Water
Associated Lab Samples: 92801413001

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
Chlordane (Technical)	ug/L	ND	3.0	06/18/25 16:28	
Endrin	ug/L	ND	0.50	06/18/25 16:28	
gamma-BHC (Lindane)	ug/L	ND	0.50	06/18/25 16:28	
Heptachlor	ug/L	ND	0.50	06/18/25 16:28	
Heptachlor epoxide	ug/L	ND	0.50	06/18/25 16:28	
Methoxychlor	ug/L	ND	1000	06/18/25 16:28	
Toxaphene	ug/L	ND	3.0	06/18/25 16:28	
Decachlorobiphenyl (S)	%	159	10-200	06/18/25 16:28	
Tetrachloro-m-xylene (S)	%	73	10-190	06/18/25 16:28	

LABORATORY CONTROL SAMPLE: 4844427

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Endrin	ug/L	1.2	0.96	77	35-200	
gamma-BHC (Lindane)	ug/L	1.2	1.1	91	24-165	
Heptachlor	ug/L	1.2	1.2	93	18-183	
Heptachlor epoxide	ug/L	1.2	1.0	81	31-159	
Methoxychlor	ug/L	3.8	2.7J	73	28-173	
Decachlorobiphenyl (S)	%			151	10-200	
Tetrachloro-m-xylene (S)	%			62	10-190	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 4844428 4844429

Parameter	Units	92801483001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
Endrin	ug/L	ND	1.2	1.2	0.68	1.4	54	111	10-200	69	R1
gamma-BHC (Lindane)	ug/L	ND	1.2	1.2	0.76	1.4	61	110	10-188	58	R1
Heptachlor	ug/L	ND	1.2	1.2	0.80	1.6	64	125	10-200	64	R1
Heptachlor epoxide	ug/L	ND	1.2	1.2	0.58	1.3	47	101	10-186	74	R1
Methoxychlor	ug/L	ND	3.8	3.8	2J	4J	54	106	10-194		
Decachlorobiphenyl (S)	%						107	182	10-200		
Tetrachloro-m-xylene (S)	%						25	105	10-190		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 944505
QC Batch Method: EPA 3546
Analysis Method: EPA 8082A
Analysis Description: 8082 GCS PCB
Laboratory: Pace Analytical Services - Charlotte
Associated Lab Samples: 92801413001

METHOD BLANK: 4854219 Matrix: Solid
Associated Lab Samples: 92801413001

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
PCB-1016 (Aroclor 1016)	ug/kg	ND	33.0	06/27/25 09:43	
PCB-1221 (Aroclor 1221)	ug/kg	ND	33.0	06/27/25 09:43	
PCB-1232 (Aroclor 1232)	ug/kg	ND	33.0	06/27/25 09:43	
PCB-1242 (Aroclor 1242)	ug/kg	ND	33.0	06/27/25 09:43	
PCB-1248 (Aroclor 1248)	ug/kg	ND	33.0	06/27/25 09:43	
PCB-1254 (Aroclor 1254)	ug/kg	ND	33.0	06/27/25 09:43	
PCB-1260 (Aroclor 1260)	ug/kg	ND	33.0	06/27/25 09:43	
Decachlorobiphenyl (S)	%	85	10-166	06/27/25 09:43	

LABORATORY CONTROL SAMPLE: 4854220

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
PCB-1016 (Aroclor 1016)	ug/kg	167	140	84	39-130	
PCB-1260 (Aroclor 1260)	ug/kg	167	152	91	44-130	
Decachlorobiphenyl (S)	%			90	10-166	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 4854221 4854222

Parameter	Units	92801413001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
PCB-1016 (Aroclor 1016)	ug/kg	ND	1070	1050	619	525	58	50	10-130	16	
PCB-1260 (Aroclor 1260)	ug/kg	ND	1070	1050	314	342	29	33	10-135	8	
Decachlorobiphenyl (S)	%						40	41	10-166		

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QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 942218
QC Batch Method: EPA 3510C
Analysis Method: EPA 8270E
Analysis Description: 8270E TCLP MSSV
Laboratory: Pace Analytical Services - Charlotte
Associated Lab Samples: 92801413001

METHOD BLANK: 4840623 Matrix: Water
Associated Lab Samples: 92801413001

Parameter	Units	Blank Result	Reporting Limit	Analyzed	Qualifiers
1,4-Dichlorobenzene	ug/L	ND	50.0	06/17/25 12:05	
2,4,5-Trichlorophenol	ug/L	ND	50.0	06/17/25 12:05	
2,4,6-Trichlorophenol	ug/L	ND	50.0	06/17/25 12:05	
2,4-Dinitrotoluene	ug/L	ND	50.0	06/17/25 12:05	
2-Methylphenol(o-Cresol)	ug/L	ND	50.0	06/17/25 12:05	
3&4-Methylphenol(m&p Cresol)	ug/L	ND	50.0	06/17/25 12:05	
Hexachloro-1,3-butadiene	ug/L	ND	50.0	06/17/25 12:05	
Hexachlorobenzene	ug/L	ND	50.0	06/17/25 12:05	
Hexachloroethane	ug/L	ND	50.0	06/17/25 12:05	
Nitrobenzene	ug/L	ND	50.0	06/17/25 12:05	
Pentachlorophenol	ug/L	ND	100	06/17/25 12:05	
Pyridine	ug/L	ND	50.0	06/17/25 12:05	
2,4,6-Tribromophenol (S)	%	84	10-166	06/17/25 12:05	
2-Fluorobiphenyl (S)	%	72	10-130	06/17/25 12:05	
2-Fluorophenol (S)	%	60	10-130	06/17/25 12:05	
Nitrobenzene-d5 (S)	%	80	10-133	06/17/25 12:05	
Phenol-d6 (S)	%	49	10-130	06/17/25 12:05	
Terphenyl-d14 (S)	%	103	10-193	06/17/25 12:05	

LABORATORY CONTROL SAMPLE: 4842654

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
1,4-Dichlorobenzene	ug/L	500	298	60	10-130	
2,4,5-Trichlorophenol	ug/L	500	441	88	36-150	
2,4,6-Trichlorophenol	ug/L	500	442	88	30-151	
2,4-Dinitrotoluene	ug/L	500	495	99	46-160	
2-Methylphenol(o-Cresol)	ug/L	500	438	88	32-130	
3&4-Methylphenol(m&p Cresol)	ug/L	500	423	85	29-130	
Hexachloro-1,3-butadiene	ug/L	500	348	70	10-130	
Hexachlorobenzene	ug/L	500	472	94	40-139	
Hexachloroethane	ug/L	500	308	62	10-130	
Nitrobenzene	ug/L	500	465	93	33-136	
Pentachlorophenol	ug/L	1000	954	95	19-156	
Pyridine	ug/L	500	58.0	12	10-130	
2,4,6-Tribromophenol (S)	%			99	10-166	
2-Fluorobiphenyl (S)	%			83	10-130	
2-Fluorophenol (S)	%			67	10-130	
Nitrobenzene-d5 (S)	%			90	10-133	
Phenol-d6 (S)	%			57	10-130	

Results presented on this page are in the units indicated by the "Units" column except where an alternate unit is presented to the right of the result.

REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

LABORATORY CONTROL SAMPLE: 4842654

Parameter	Units	Spike Conc.	LCS Result	LCS % Rec	% Rec Limits	Qualifiers
Terphenyl-d14 (S)	%			106	10-193	

MATRIX SPIKE & MATRIX SPIKE DUPLICATE: 4842655 4842656

Parameter	Units	92801413001 Result	MS Spike Conc.	MSD Spike Conc.	MS Result	MSD Result	MS % Rec	MSD % Rec	% Rec Limits	RPD	Qual
1,4-Dichlorobenzene	ug/L	ND	500	500	150	178	30	36	10-130	17	
2,4,5-Trichlorophenol	ug/L	ND	500	500	396	449	79	90	10-174	13	
2,4,6-Trichlorophenol	ug/L	ND	500	500	380	432	76	86	10-173	13	
2,4-Dinitrotoluene	ug/L	ND	500	500	467	489	93	98	29-168	5	
2-Methylphenol(o-Cresol)	ug/L	ND	500	500	368	428	74	86	10-130	15	
3&4-Methylphenol(m&p Cresol)	ug/L	ND	500	500	353	412	71	82	10-132	16	
Hexachloro-1,3-butadiene	ug/L	ND	500	500	204	226	41	45	10-130	10	
Hexachlorobenzene	ug/L	ND	500	500	434	466	87	93	27-145	7	
Hexachloroethane	ug/L	ND	500	500	147	166	29	33	10-130	12	
Nitrobenzene	ug/L	ND	500	500	367	421	73	84	10-145	14	
Pentachlorophenol	ug/L	ND	1000	1000	960	983	96	98	10-178	2	
Pyridine	ug/L	ND	500	500	22.7J	47J	5	9	10-130		M1
2,4,6-Tribromophenol (S)	%						77	86	10-166		
2-Fluorobiphenyl (S)	%						47	66	10-130		
2-Fluorophenol (S)	%						40	50	10-130		
Nitrobenzene-d5 (S)	%						49	67	10-133		
Phenol-d6 (S)	%						39	47	10-130		
Terphenyl-d14 (S)	%						88	91	10-193		

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9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 940995
QC Batch Method: SW-846
Analysis Method: SW-846
Analysis Description: Dry Weight/Percent Moisture
Laboratory: Pace Analytical Services - Charlotte

Associated Lab Samples: 92801413001

SAMPLE DUPLICATE: 4836129

Parameter	Units	92801096021 Result	Dup Result	RPD	Qualifiers
Percent Moisture	%	11.9	11.5	3	N2

SAMPLE DUPLICATE: 4836130

Parameter	Units	92801413001 Result	Dup Result	RPD	Qualifiers
Percent Moisture	%	84.2	84.2	0	N2

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REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

QUALITY CONTROL DATA

Project: TCLP Testing
Pace Project No.: 92801413

QC Batch: 941293
QC Batch Method: EPA 9095B
Analysis Method: EPA 9095B
Analysis Description: 9095 PAINT FILTER LIQUID TEST
Laboratory: Pace Analytical Services - Asheville

Associated Lab Samples: 92801413001

SAMPLE DUPLICATE: 4837515

Parameter	Units	92801154001 Result	Dup Result	RPD	Qualifiers
Free Liquids		FAIL	FAIL		

Results presented on this page are in the units indicated by the "Units" column except where an alternate unit is presented to the right of the result.

REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

QUALIFIERS

Project: TCLP Testing
Pace Project No.: 92801413

DEFINITIONS

DF - Dilution Factor, if reported, represents the factor applied to the reported data due to dilution of the sample aliquot.

ND - Not Detected at or above adjusted reporting limit.

TNTC - Too Numerous To Count

J - Estimated concentration above the adjusted method detection limit and below the adjusted reporting limit.

MDL - Adjusted Method Detection Limit.

PQL - Practical Quantitation Limit.

RL - Reporting Limit - The lowest concentration value that meets project requirements for quantitative data with known precision and bias for a specific analyte in a specific matrix.

S - Surrogate

1,2-Diphenylhydrazine decomposes to and cannot be separated from Azobenzene using Method 8270. The result for each analyte is a combined concentration.

Consistent with EPA guidelines, unrounded data are displayed and have been used to calculate % recovery and RPD values.

LCS(D) - Laboratory Control Sample (Duplicate)

MS(D) - Matrix Spike (Duplicate)

DUP - Sample Duplicate

RPD - Relative Percent Difference

NC - Not Calculable.

SG - Silica Gel - Clean-Up

U - Indicates the compound was analyzed for, but not detected.

Acid preservation may not be appropriate for 2 Chloroethylvinyl ether.

A separate vial preserved to a pH of 4-5 is recommended in SW846 Chapter 4 for the analysis of Acrolein and Acrylonitrile by EPA Method 8260.

N-Nitrosodiphenylamine decomposes and cannot be separated from Diphenylamine using Method 8270. The result reported for each analyte is a combined concentration.

Reported results are not rounded until the final step prior to reporting. Therefore, calculated parameters that are typically reported as "Total" may vary slightly from the sum of the reported component parameters.

Pace Analytical is TNI accredited. Contact your Pace PM for the current list of accredited analytes.

TNI - The NELAC Institute.

ANALYTE QUALIFIERS

M1	Matrix spike recovery exceeded QC limits. Batch accepted based on laboratory control sample (LCS) recovery.
N2	The lab does not hold NELAC/TNI accreditation for this parameter but other accreditations/certifications may apply. A complete list of accreditations/certifications is available upon request.
R1	RPD value was outside control limits.

REPORT OF LABORATORY ANALYSIS

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Pace Analytical Services, LLC
9800 Kincey Ave. Suite 100
Huntersville, NC 28078
(704)875-9092

QUALITY CONTROL DATA CROSS REFERENCE TABLE

Project: TCLP Testing
Pace Project No.: 92801413

Lab ID	Sample ID	QC Batch Method	QC Batch	Analytical Method	Analytical Batch
92801413001	**UC12-BFP-1-CAKE**	8151A	2540308	EPA 8151A	2540308
92801413001	**UC12-BFP-1-CAKE**	EPA 3510C	942664	EPA 8081B	942760
92801413001	**UC12-BFP-1-CAKE**	EPA 3546	944505	EPA 8082A	944634
92801413001	**UC12-BFP-1-CAKE**	EPA 3010	1105637	EPA 6010	1105881
92801413001	**UC12-BFP-1-CAKE**	EPA 7470	1106767	EPA 7470	1106841
92801413001	**UC12-BFP-1-CAKE**	EPA 3510C	942218	EPA 8270E	942337
92801413001	**UC12-BFP-1-CAKE**	EPA 8260D	942690		
92801413001	**UC12-BFP-1-CAKE**	SM 2540G-2011	941253		
92801413001	**UC12-BFP-1-CAKE**	SW-846	940995		
92801413001	**UC12-BFP-1-CAKE**	EPA 9095B	941293		

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Pace

DC#_Title: ENV-FRM-HUN1-0083 v05_Sample Condition Upon Receipt

Effective Date: 05/24/2024

Laboratory receiving samples:

Asheville ☐ Eden ☐ Greenwood ☐ Huntersville ☑ Raleigh ☐ Mechanicsville ☐ Atlanta ☐ Kernersville ☐

Sample Condition Upon Receipt

Client Name: Union County

Project #:

WO#: 92801413

92801413

Courier: ☐ Commercial ☐ Fed Ex ☐ Pace ☐ UPS ☐ USPS ☑ Other: UC ☐ Client

Custody Seal Present? ☐ Yes ☑ No Seals Intact? ☐ Yes ☐ No ☑ N/A

Date/Initials Person Examining Contents: TC 6.10.25

Packing Material: ☐ Bubble Wrap ☑ Bubble Bags ☐ None ☐ Other

Biological Tissue Frozen? ☐ Yes ☐ No ☑ N/A

Thermometer: ☐ IR Gun ID: 92T083

Type of Ice: ☑ Wet ☐ Blue ☐ None

Cooler Temp: 3.5 Correction Factor: Add/Subtract (°C) 0

Cooler Temp Corrected (°C): 3.5

Temp should be above freezing to 6°C

☐ Samples out of temp criteria. Samples on ice, cooling process has begun

USDA Regulated Soil (☐ N/A, water sample)

Did samples originate in a quarantine zone within the United States: CA, NY, or SC (check maps)? ☐ Yes ☑ No

Did samples originate from a foreign source (internationally, including Hawaii and Puerto Rico)? ☐ Yes ☑ No

				Comments/Discrepancy:
Chain of Custody Present?	☑ Yes	☐ No	☐ N/A	1.
Samples Arrived within Hold Time?	☑ Yes	☐ No	☐ N/A	2.
Short Hold Time Analysis (<72 hr.)?	☐ Yes	☑ No	☐ N/A	3.
Rush Turn Around Time Requested?	☐ Yes	☑ No	☐ N/A	4.
Sufficient Volume?	☑ Yes	☐ No	☐ N/A	5.
Correct Containers Used?	☑ Yes	☐ No	☐ N/A	6.
-Pace Containers Used?	☑ Yes	☐ No	☐ N/A	
Containers Intact?	☑ Yes	☐ No	☐ N/A	7.
Dissolved analysis: Samples Field Filtered?	☐ Yes	☑ No	☐ N/A	8.
Sample Labels Match COC?	☑ Yes	☐ No	☐ N/A	9.
-Includes Date/Time/ID/Analysis Matrix: SL				
Headspace in VOA Vials (>5-6mm)?	☐ Yes	☐ No	☑ N/A	10.
Trip Blank Present?	☐ Yes	☐ No	☑ N/A	11.
Trip Blank Custody Seals Present?	☐ Yes	☐ No	☑ N/A	

COMMENTS/SAMPLE DISCREPANCY

Field Data Required? ☐ Yes ☐ No

Lot ID of split containers:

CLIENT NOTIFICATION/RESOLUTION

Person contacted: Date/Time:

Project Manager SCURF Review: Date:

Project Manager SRF Review: Date:

WO#: 92801413

PM: SK Due Date: 06/24/25

CLIENT: 92-Union Cou

*Check mark top half of box if pH and/or dechlorination is verified and within the acceptance range for preservation samples.
Exceptions: VOA, Coliform, TOC, Oil and Grease, DRO/8015 (water) DOC, LLHg
**Bottom half of box is to list number of bottles
***Check all unpreserved Nitrates for chlorine

Project #

Laboratory Receiving location: Asheville ☐ Eden ☐ Greenwood ☐ Huntersville ☐ Raleigh ☐ Mechanicsville ☐ Atlanta ☐ Kernersville ☐

Client_____ Profile/EZ (Circle one)_____ Notes_____

Item#	BP4U-125 mL Plastic Unpreserved (N/A) (Cl-)	BP3U-250 mL Plastic Unpreserved (N/A)	BP2U-500 mL Plastic Unpreserved (N/A)	BP1U-1 liter Plastic Unpreserved (N/A)	AG2U	BP4S-125 mL Plastic H2SO4 (pH < 2) (Cl-)	BP3N-250 mL plastic HNO3 (pH < 2)	BP4Z-125 mL Plastic ZN Acetate & NaOH (>9)	BP4B-125 mL Plastic NaOH (pH > 12) (Cl-)	WGFU-Wide-mouthed Glass jar Unpreserved	AG1U-1 liter Amber Unpreserved (N/A) (Cl-)	AG1H-1 liter Amber HCl (pH < 2)	AG3U-250 mL Amber Unpreserved (N/A) (Cl-)	AG1S-1 liter Amber H2SO4 (pH < 2)	AG3S-250 mL Amber H2SO4 (pH < 2)	DG84-40 mL Amber NH4Cl (N/A)(Cl-)	DG9H-40 mL VOA HCl (N/A)	VG9T-40 mL VOA Na2S2O3 (N/A)	VG9U-40 mL VOA Unpreserved (N/A)	DG9V-40 mL VOA H3PO4 (N/A)	KP7U-50 mL Plastic Unpreserved (N/A)	VJGK (3 vials per kit)-VPH/Gas kit (N/A)	SP5T-125 mL Sterile Plastic (N/A - lab)	SP2T-250 mL Sterile Plastic (N/A - lab)		BP3R-250 mL Plastic (NH2)2SO4 (9.3-9.7)	AG0U-100 mL Amber Unpreserved (N/A) (Cl-)	VSGU-40 mL Scintillation vials (N/A)	DG9U-40 mL Amber Unpreserved vials (N/A)
CC																														
1													1																	
2										1																				
3					1																									
4					1																									
5													1																	
6													1																	
7																														
8																														
9																														
10																														
11																														
12																														

pH Adjustment Log for Preserved Samples

Sample ID	Type of Preservative	pH upon receipt	Date preservation adjusted	Time preservation adjusted	Amount of Preservative added	Lot #

Note: Whenever there is a discrepancy affecting North Carolina compliance samples, a copy of this form will be sent to the North Carolina DENR Certification Office (i.e. Out of hold, incorrect preservative, out of temp, incorrect containers.

Pace® Location Requested (City/State):
Pace Analytical Kernersville, NC
1377 South Park Dr., Kernersville, NC 27284

CHAIN-OF-CUSTODY Analytical Request Document

Chain-of-Custody is a LEGAL DOCUMENT - Complete all relevant fields

LAB USE ONLY- Affix Workorder/Login Label Here

Scan QR Code for instructions

Company Name:	Union County Public Works	Contact/Report To:	Keith Purgason
Street Address:	8299 Kensington Drive Waxhaw, NC 28173	Phone #:	(704)318-7177
		E-Mail:	keith.purgason@unioncountync.gov
		Cc E-Mail:	
Customer Project #:			
Project Name:	TCLP Testing	Invoice To:	AP County
		Invoice E-Mail:	water.ap@unioncountync.gov
Site Collection Info/Facility ID (as applicable):		Purchase Order # (if applicable):	
		Quote #:	

Time Zone Collected: [ ] AK [ ] PT [ ] MT [ ] CT [X] ET

County / State origin of sample(s): North Carolina

Data Deliverables: [ ] Level II [ ] Level III [ ] Level IV [ ] EQUIS [ ] Other

Regulatory Program (DW, RCRA, etc.) as applicable: Reportable [ ] Yes [ ] No

Rush (Pre-approval required): [ ] Same Day [ ] 1 Day [ ] 2 Day [ ] 3 Day [ ] Other

DW PWSID # or WW Permit # as applicable:

Date Results Requested:

Field Filtered (if applicable): [ ] Yes [ ] No

Analysis:

Specify Container Size **: 3 | 10 | 2 | 2 | 3 | 3

Identify Container Preservative Type***: 1 | 1 | 1 | 1 | 1 | 1

**Container Size: (1) 1L, (2) 500mL, (3) 250mL, (4) 125mL, (5) 100mL, (6) 40mL vial, (7) EnCore, (8) TerraCore, (9) 90mL, (10) Other

*** Preservative Types: (1) None, (2) HNO3, (3) H2SO4, (4) HCl, (5) NaOH, (6) Zn Acetate, (7) NaHSO4, (8) Sod. Thiosulfate, (9) Ascorbic Acid, (10) MeOH, (11) Other

Lab Use Only: Proj. Mgr: Stephanie Knott; AcctNum / Client ID:; Table #:; Profile / Template: 16076; Prelog / Bottle Ord. ID: EZ 3268088

Preservation non-conformance identified for sample.

* Matrix Codes (Insert in Matrix box below): Drinking Water (DW), Ground Water (GW), Waste Water (WW), Product (P), Soil/Solid (SS), Oil (OL), Wipe (WP), Tissue (TS), Bioassay (B), Vapor (V), Surface Water (SW),Sediment (SED), Sludge (SL), Caulk (CK), Leachate (LL), Biosolid (BS), Other (OT)

Customer Sample ID	Matrix *	Comp / Grab	Composite Start Date	Composite Start Time	Collected or Composite End Date	Collected or Composite End Time	# Cont.	Res. Chlorine Results	Res. Chlorine Units	8082 Total PCB/% Solids	9095 Paint Filter Liquid Test	RCI - ELON	TCLP 8260/8270/8081	TCLP Herbicides by 8151 - PN	TCLP RCRA 8 Metals - OB	Sample Comment
UC12-BFP_1_CAFE	BS	G			06/10/25	0645	1			X						
UC12-BFP_1_CAFE	BS	G			06/10/25	0645	1				X					
UC12-BFP_1_CAFE	BS	G			06/10/25	0645	1					X				
UC12-BFP_1_CAFE	BS	G			06/10/25	0645	1						X	X	TFC	
UC12-BFP_1_CAFE	BS	G			06/10/25	0645	1							X	X TFC	
UC12-BFP_1_CAFE	BS	G			06/10/25	0645	1								X	

Additional Instructions from Pace®:

Collected By: (Printed Name) JULIAN H. COLEY

Signature: Julian H Coley

Customer Remarks / Special Conditions / Possible Hazards:

Coolers: | Thermometer ID: | Correction Factor (°C): | Obs. Temp. (°C) | Corrected Temp. (°C) | On Ice:

Relinquished by/Company: (Signature)	Date/Time:	Received by/Company: (Signature)	Date/Time:	Tracking Number:
Julian H Coley / UCW	06/10/25 @ 0718		6/10/25 1044	
	6/10/25 1255	Pace HVL	6.10.25 1255	Delivered by: [ ] In- Person [ ] Courier [ ] FedEx [ ] UPS [ ] Other

Page: 1 of 1

Submitting a sample via this chain of custody constitutes acknowledgment and acceptance of the Pace® Terms and Conditions found at https://www.pacelabs.com/resource-library/resource/pace-terms-and-conditions/

ENV-FRM-CORQ-0019_v02_110123 ©

39 Spruce Street * East Longmeadow, MA 01028 * FAX 413/525-6405 * TEL. 413/525-2332

June 26, 2025

Stephanie Knott
Pace Analytical Services - NC
1377 South Park Dr.
Kernersville, NC 27284

Project Location: TCLP Tsting
Client Job Number:
Project Number: 92801413
Laboratory Work Order Number: 25F0823

Enclosed are results of analyses for samples as received by the laboratory on June 11, 2025. If you have any questions concerning this report, please feel free to contact me.

Sincerely,



Rebecca Faust
Project Manager

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39 Spruce Street * East Longmeadow, MA 01028 * FAX 413/525-6405 * TEL. 413/525-2332

Pace Analytical Services - NC
1377 South Park Dr.
Kernersville, NC 27284
ATTN: Stephanie Knott

REPORT DATE: 6/26/2025

PURCHASE ORDER NUMBER:

PROJECT NUMBER: 92801413

ANALYTICAL SUMMARY

WORK ORDER NUMBER: 25F0823

The results of analyses performed on the following samples submitted to Pace Analytical Services, LLC - East Longmeadow, Ma, are found in this report.

PROJECT LOCATION: TCLP Tsting

FIELD SAMPLE #	LAB ID:	MATRIX	SAMPLE DESCRIPTION	TEST	SUB LAB
UC12-BRP-1-CAKE	25F0823-01	Soil		SW-846 1030 SW-846 9014 SW-846 9030A SW-846 9045D	

39 Spruce Street * East Longmeadow, MA 01028 * FAX 413/525-6405 * TEL. 413/525-2332

CASE NARRATIVE SUMMARY

All reported results are within defined laboratory quality control objectives unless listed below or otherwise qualified in this report.

SW-846 9045D

Qualifications:

H-03

Sample received after recommended holding time was exceeded.

Analyte & Samples(s) Qualified:

pH

25F0823-01[UC12-BRP-1-CAKE]

The results of analyses reported only relate to samples submitted to Pace Analytical Services, LLC - East Longmeadow, Ma, for testing.
I certify that the analyses listed above, unless specifically listed as subcontracted, if any, were performed under my direction according to the approved methodologies listed in this document, and that based upon my inquiry of those individuals immediately responsible for obtaining the information, the material contained in this report is, to the best of my knowledge and belief, accurate and complete.



Lisa A. Worthington
Technical Representative

39 Spruce Street * East Longmeadow, MA 01028 * FAX 413/525-6405 * TEL. 413/525-2332

Project Location: TCLP Tsting | Sample Description: | Work Order: 25F0823

Date Received: 6/11/2025

Field Sample #: UC12-BRP-1-CAKE | Sampled: 6/10/2025 06:45

Sample ID: 25F0823-01

Sample Matrix: Soil

Conventional Chemistry Parameters by EPA/APHA/SW-846 Methods (Total)

Analyte	Results	RL	DL	Units	DF	Flag/Qual	Method	Date Prepared	Date/Time Analyzed	Analyst
Ignitability	Absent			present/absent	1		SW-846 1030	6/25/25	6/25/25 13:21	EDS
pH @20.6°C	6.3			pH Units	1	H-03	SW-846 9045D	6/12/25	6/12/25 23:48	JF
Reactive Cyanide	ND	3.9	3.9	mg/Kg	1		SW-846 9014	6/16/25	6/17/25 14:00	EC
Reactive Sulfide	ND	20	20	mg/L	1		SW-846 9030A	6/18/25	6/18/25 14:00	EC

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Sample Extraction Data

SW-846 1030

Lab Number [Field ID]	Batch	Initial [g]	Date
25F0823-01 [UC12-BRP-1-CAKE]	B408068	50.0	06/25/25

SW-846 9014

Lab Number [Field ID]	Batch	Initial [g]	Final [mL]	Date
25F0823-01 [UC12-BRP-1-CAKE]	B407418	25.5	250	06/16/25

Prep Method: SW-846 7.3-SW-846 9030A

Lab Number [Field ID]	Batch	Initial [g]	Final [mL]	Date
25F0823-01 [UC12-BRP-1-CAKE]	B407664	25.0	250	06/18/25

SW-846 9045D

Lab Number [Field ID]	Batch	Initial [g]	Date
25F0823-01 [UC12-BRP-1-CAKE]	B407270	20.0	06/12/25

39 Spruce Street * East Longmeadow, MA 01028 * FAX 413/525-6405 * TEL. 413/525-2332

QUALITY CONTROL

Conventional Chemistry Parameters by EPA/APHA/SW-846 Methods (Total) - Quality Control

Analyte	Result	Reporting Limit	DL	Units	Spike Level	Source Result	%REC	%REC Limits	RPD	RPD Limit	Notes
Batch B407270 - SW-846 9045D											
LCS (B407270-BS1)					Prepared & Analyzed: 06/12/25						
pH	5.96			pH Units	6.000		99.3	90-110			
Duplicate (B407270-DUP1)		**Source: 25F0823-01**			Prepared & Analyzed: 06/12/25						
pH	6.3			pH Units		6.3			0.602	12.5	
Batch B407418 - SW-846 9014											
Blank (B407418-BLK1)					Prepared: 06/16/25 Analyzed: 06/17/25						
Reactive Cyanide	ND	0.40	0.40	mg/Kg							
LCS (B407418-BS1)					Prepared: 06/16/25 Analyzed: 06/17/25						
Reactive Cyanide	9.3	0.40	0.40	mg/Kg	10.00		93.4	83.6-115			
Batch B407664 - SW-846 7.3											
Blank (B407664-BLK1)					Prepared & Analyzed: 06/18/25						
Reactive Sulfide	ND	2.0	2.0	mg/L							
LCS (B407664-BS1)					Prepared & Analyzed: 06/18/25						
Reactive Sulfide	10	2.0	2.0	mg/L	10.05		103	77.2-118			
Batch B408068 - SW-846 1030											
Blank (B408068-BLK1)					Prepared & Analyzed: 06/25/25						
Ignitability	Absent			present/absent							

39 Spruce Street * East Longmeadow, MA 01028 * FAX 413/525-6405 * TEL. 413/525-2332

FLAG/QUALIFIER SUMMARY

*	QC result is outside of established limits.
†	Wide recovery limits established for difficult compound.
‡	Wide RPD limits established for difficult compound.
#	Data exceeded client recommended or regulatory level
ND	Not Detected
RL	Reporting Limit
DL	Method Detection Limit
MCL	Maximum Contaminant Level
	Percent recoveries and relative percent differences (RPDs) are determined by the software using values in the calculation which have not been rounded.
	No results have been blank subtracted unless specified in the case narrative section.
H-03	Sample received after recommended holding time was exceeded.

39 Spruce Street * East Longmeadow, MA 01028 * FAX 413/525-6405 * TEL. 413/525-2332

CERTIFICATIONS

Certified Analyses included in this Report

Analyte	Certifications
SW-846 1030 in Soil	
Ignitability	NC,NY,NH,CT,ME,VA
SW-846 9045D in Soil	
pH	NY

Pace Analytical Services, LLC - East Longmeadow, Ma, operates under the following certifications and accreditations:

Code	Description	Number	Expires
CT	Connecticut Department of Public Health	PH-0821	12/31/2026
NY	New York State Department of Health	10899 NELAP	04/1/2026
NH	New Hampshire Environmental Lab	2516 NELAP	02/5/2026
NC	North Carolina Div. of Water Quality	652	12/31/2025
ME	State of Maine	MA00100	06/9/2027
VA	Commonwealth of Virginia	460217	12/14/2025

25-0823

Internal Transfer Chain of Custody

Pace

☐ Rush Multiplier____X
☐ Samples Pre-Logged into eCOC

State Of Origin: NC
Cert. Needed: [X] Yes ☐ No
Owner Received Date: 6/10/2025 Results Requested By: 6/24/2025

Workorder: 92801413 **Workorder Name:** TCLP Testing

Report To	Subcontract To
Stephanie Knott Pace Analytical Kernersville 1377 South Park Drive Kernersville, NC 27284 Phone 704-977-0981	Pace New England 39 Spruce St. East Longmeadow, MA 01028 Phone (413)525-2332

Item	Sample ID	Sample Type	Collect Date/Time	Lab ID	Matrix	Preserved Containers: Unpreserved	RCI	Requested Analysis	LAB USE ONLY
1	UC12-BRP-1-CAKE	PS	6/10/2025 06:45	92801413001	Solid	1	X		
2									
3									
4									
5									

Transfers	Released By	Date/Time	Received By	Date/Time
1	[illegible] Pace Hol	6/10 1800	[illegible] 38	6/11/25
2				
3				

Comments: 0955

Cooler Temperature on Receipt ____ °C | Custody Seal Y or N | Received on Ice Y or N | Samples Intact Y or N

****In order to maintain client confidentiality, location/name of the sampling site, sampler's name and signature may not be provided on this COC document.*
This chain of custody is considered complete as is since this information is available in the owner laboratory.

FedEx

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Signed for by: R.Lai

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To
EAST LONGMEADOW,MA US

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FedEx Logistics
ShopRunner

LANGUAGE
United States

Pace	DC#_Title: ENV-FRM-ELON-0001 v08_Sample Receiving Checklist
	Effective Date: 06/11/2024

Log In Back-Sheet

Login Sample Receipt Checklist – (Rejection Criteria Listing - Using Acceptance Policy) Any False statement will be brought to the attention of the Client – True or False

Client: Pace

Project: TCLP testing

MCP/RCP Required: N/A

Deliverable Package Requirement: N/A

Location: TCLP Testing

PWSID# (When Applicable): N/A

Arrival Method:

Courier ☐ Fed Ex ☑ Walk In ☐ Other ☐ _____

Received By / Date / Time: Ryan 6/11/25 955

Back-Sheet By / Date / Time: LA 6/11/25 1213

Temperature Method: Gun # 6

WV samples: Yes (see note*) / (No) follow normal procedure)

Temp ✓ < 6° C Actual Temperature: 3.8

Rush Samples: Yes / (No) Notify: _____

Short Hold: Yes / (No) Notify: _____

	True	False
Received on Ice	☐	☐
Received in Cooler	☐	☐
Custody Seal: DATE ____ TIME ____	☐	☐
COC Relinquished	☐	☐
COC/Samples Labels Agree	☐	☐
All Samples in Good Condition	☐	☐
Samples Received within Holding Time	☐	☐
Is there enough Volume	☐	☐
Proper Media/Container Used	☐	☐
Splitting Samples Required	☐	☐
MS/MSD	☐	☐
Trip Blanks	☐	☐
Lab to Filters	☐	☐
COC Legible	☐	☐

COC Included: (Check all included)

Client ☐ Analysis ☐ Sampler Name ☐

Project ☐ IDs ☐ Collection Date/Time ☐

All Samples Proper pH: N/A ☐ ☐

Notes regarding Samples/COC outside of SOP:

Additional Container Notes

Note: West Virginia requires all samples to have their temperature taken. Note any outliers.

Qualtrax ID: 120836

Sample			
16oz Amb/Clear	(Circle Amb/Clear)	Soils Jars	
8oz Amb/Clear			
4oz Amb/Clear			
2oz Amb/Clear			
Unpreserved	1 Liter	Ambers	
HCL			
Sulfuric			
Sulfuric	250mL		
Phosphoric			
HCl			
Unpreserved	100mL		
Unpreserved	1 Liter	Plastics	
Sulfuric			
Unpreserved	500mL		
Sulfuric			
Unpreserved	250mL		
Trizma			
Sulfuric			
Nitric			
NaOH			
Ammonium Acetate			
NaOH/Zinc			
Unpreserved		VOA Vials	
HCl			
MeOH			
D.I. Water			
BISulfate			
Col/Bact		Other / Fill in	
500 mL Amber unpres			

20	19	18	17	16	15	14	13	12	11	10	9	8	7	6	5	4	3	2	1

UNIONCOUNTY
north carolina

Request for Proposals 2026-044

Aeration Tank Cleaning

ADDENDUM No. 3

ISSUE DATE: February 27, 2026

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named RFP document.

The following items add to, modify, and/or clarify the RFP documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the RFP document.

Delete/Add/Replace Section

1. **Add: Additional Non mandatory site visit**

   A second A Non-Mandatory Pre-proposal and Site Visit Meeting: This is a non-mandatory meeting that will take place on **March 5, 2026 at 11:00 AM EST** at the Twelve Mile Creek WRF, 8299 Kensington Dr. Waxhaw NC 28173. Representatives from Union County Water will be on-hand to give a brief overview of the project and to answer questions. Attendance at this meeting is strongly encouraged.

   If you plan to walk out to the aeration basin, we ask that all attendees wear closed-toe shoes for safety.

Question/Answer Section

1. **Question:** Who is responsible for the replacement of damaged diffusers?

   Answer: The selected contractor will be responsible for the replacement or repair of any damaged diffusers as a result of the contractor's operations during the performance of the work.

   Prior to the start of cleaning activities, the County may add water and air to the basin to allow both the County and the selected contractor to document and verify the condition of the existing diffusers. This will establish the baseline condition of the equipment before work begins.

2. **Question:** Are there any filtrate limitations?

   Answer: Yes. Please refer to Section 4.1 of the RFP.

3. **Question:** Are there any dry bed availability of drying beds?

   Answer: No. Disposal of all removed materials is the responsibility of the selected contractor, in accordance with the RFP requirements.

End of Addendum No. 3

8 APPENDIX A – PRICE FORM

RFP 2026-044 Aeration Tank Cleaning
Submit with Proposal

Company Name Wind River Environmental, LLC

DESCRIPTION	MOBILIZATION	DEMOBILIZATION	PRICE PER WET TON	ESTIMATED VOLUME TO BE REMOVED (WET TONS)	ESTIMATED TOTAL PRICE
Refer to section 4. Scope of Services	$ 7,788	$ 10,335	$323.37	350	131,305 $

Note: The estimated volume to be removed and the estimated total price are provided for budgeting and comparison purposes only. Actual quantities will be determined during performance of the work. Evaluation of pricing will be based primarily on mobilization costs, demobilization costs, and the price per wet ton.

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

File #: 26-289 **Agenda Date:** 5/18/2026

TITLE:

Contract - Crooked Creek WRF Filter Replacement

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 Hazen and Sawyer, P.C. substantially consistent with this agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, and 3) terminate the Agreement if deemed in the best interest of the County, each in the County Manager's discretion.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Capital Improvement Program for Union County Water, as adopted by the Board of County Commissioners, includes funding for rehab and renewal of the Crooked Creek WRF. An evaluation was completed on the Crooked Creek WRF to assess the condition of the facility and identify infrastructure that requires improvements. The filter equipment provides treatment to meet NCDEQ effluent discharge limits. The existing filters are no longer operational due to their age and inability to source outdated components necessary for repair; therefore, this filter replacement project was identified as the first priority for replacement for the facility to continue to comply with its effluent discharge limits.

Hazen and Sawyer, P.C. has been selected to provide engineering design and bid services for Task Order 10022-01: Crooked Creek WRF Filter Replacement. Hazen and Sawyer, P.C. was chosen from a list of vendors previously selected from RFQ 2026-002 - Engineering Services for Water Reclamation Facility Improvements to provide these services for Union County Projects.

FINANCIAL IMPACT:

The total cost of Task Order 10022-01 with Hazen and Sawyer, P.C. is $512,000.00. Sufficient funds are available within the adopted capital account 60185100 - Crooked Creek WRF Filter Replacement.

APPENDIX

Exhibit A

TASK ORDER NUMBER: 10022-1

RFQ NUMBER: 2026-002

PROJECT NAME: Crooked Creek WRF Filter Replacement

This Task Order pertains to an Agreement (Contract #10022) by and between UNION COUNTY, NORTH CAROLINA ("OWNER"), and Hazen and Sawyer, P.C. ("ENGINEER" or "Engineer"), dated January 14, 2026 ("the Agreement"). ENGINEER shall perform services on the project described below as provided herein and in the Agreement. This Task Order shall not be binding until it has been properly signed by both parties. Upon execution, this Task Order shall supplement the Agreement as it pertains to the project described below.

PART 1.0 PROJECT DESCRIPTION:

The purpose of this task order is for ENGINEER to provide preliminary engineering services, design services, and bid phase services to replace the existing tertiary sand bed filters with cloth disk filters at the Crooked Creek Water Reclamation Facility (WRF). Work will be performed with the understanding that: (a) the existing filters no longer serve their intended purpose and must be replaced; (b) the new filters will be Kruger disk filters to match equipment used at the OWNER's other WRFs.

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

Basic services to be provided by ENGINEER include the following task as delineated and expanded in greater detail below and per the Agreement:

- Task No. 1 – Preliminary Engineering Services
- Task No. 2 – Design Services
- Task No. 3 – Bid Phase Services
- Task No. 4 – Allowance for Subconsultants and Expenses
- Task No. 5 – Allowance for Additional Services

TASK NO. 1 – Preliminary Engineering Services

Subtask 1.1 Field Evaluation – ENGINEER will perform field evaluation to determine equipment and facility location alternatives, equipment support considerations (e.g. existing structures, electrical service, etc.), siting, and constructability. Evaluation of existing structure(s) will include upper evaluation from viewable areas as well as confined space entry to evaluate the condition of the concrete inside the structure. Confined space entry will include logistics associated with securing equipment rental and delivery to site. [Rental and delivery cost for equipment is included under Task No. 4.]

Subtask 1.2 Technical Memorandum – ENGINEER will develop a technical memorandum (TM) summarizing the findings and recommendations for the OWNER. The TM will include two alternatives for locating the new equipment: (a) within the footprint of the existing filter structure; and (b) adjacent to, but separate from, the existing filter structure. The TM will address the following considerations:

- Specific requirements for the Kruger disk filter system including number of units, sizing of disks to match other WRFs, and sole-sourcing of equipment.

- Constructability including maintenance of existing plant in operation and effluent permit considerations, including developing plan to perform work without using bypass pumping and/or piping operations.

- Evaluation of existing filter structure (drawings and field condition of concrete) to develop understanding of viability of installing disk filter units and supporting piping, valves, etc. within the footprint of the existing structure. Evaluation will include Revit model development of existing structure.

- Evaluation of existing influent box at filter structure to determine viability to be used for flow management to new filters and for bypass operations.

- Support systems including electrical and instrumentation and controls (I&C), including confirming if system can be fully supported from existing electrical gear and identifying plan for decommissioning existing electrical services to be selectively demolished or salvaged as future spares, as appropriate.

- Determine expected equipment lead time with Kruger to establish project schedule.

ENGINEER will host a meeting with the OWNER to review the TM and adjust the TM with comments from the OWNER to deliver the final TM.

TASK NO. 2 – Detailed Design Services

Subtask 2.1 Develop Detailed Drawings – ENGINEER will prepare detailed drawings suitable for bidding by a North Carolina licensed General Contractor for the recommended improvements to be performed. Estimated drawings are summarized in the table below.

Estimated Number of Detailed Drawings

Series Description	No. of Drawings
General / Civil / Site	8
Mechanical	8
Structural	5
Instrumentation / Controls / P&IDs	2
Electrical	7
Standard Details	10
TOTAL	40

Subtask 2.2 Develop Technical Specifications – Prepare performance based technical specifications for all aspects of the work such that the project results in a complete working facility. Specifications will be developed in Division 50 format and in accordance with applicable law concerning specifications to be used in a county project. Related work to be performed under this task includes:

- Maintenance of Utility Operations during Construction – Develop a detailed plan for maintenance of plant operations during construction including consideration of maintaining permit compliance while sequencing new facilities into service and demolishing existing facilities, as necessary.
- Functional Control Descriptions – Develop functional control descriptions describing the required operation, monitoring, and control of the new facilities. New and/or modified graphic display screens depicting the improvements will be described by the ENGINEER and incorporated into the plant SCADA system during construction.
- General Requirements – Develop general requirements for construction including, without limitation:
    - Summary of Work
    - Modification Procedures
    - Coordination
    - Abbreviations and Reference Standards
    - Project Meetings

- Submittals
- Construction Schedules
- Quality Control
- Temporary Utilities
- Maintenance of Utility Operations During Construction
- Protection of Existing Facilities
- Demolition and Removal of Existing Structures and Equipment
- Site Access and Storage
- Temporary Environmental Controls
- Field Office, Equipment and Services
- Material and Equipment
- Project Closeout

- Front End Bidding Documents – Develop bidding documents utilizing OWNER's most current format including, without limitation:
  - Section C-111 – Advertisement for Bids
  - Section C-200 – Instructions to Bidders
  - Section C-410 – Bid Form
  - Section C-430 – Bid Bond
  - Section C-510 – Notice of Award
  - Section C-520 – Agreement
  - Section C-550 – Notice to Proceed
  - Section C-610 – Performance Bond
  - Section C-615 – Payment Bond
  - Section C-620 – Contractor's Application for Payment
  - Section C-625 – Certificate of Substantial Completion
  - Section C-700 – Standard General Conditions
  - Section C-800 – Supplementary Conditions
  - Section C-940 – Work Change Directive
  - Section C-941 – Change Order
  - Section C-942 – Field Order
  - Section C-950 – E-Verify Affidavit

Subtask 2.3 Quality Assurance / Quality Control – Conduct an internal technical and constructability review at key milestones (60%, 90%, 100%) in accordance with the Engineer's Quality Assurance Policy Manual. Review of the design to date will include:

- Specified manufacturers of major equipment items in accordance with applicable law concerning specifications to be used in a county project
- Design calculations
- I/O listing and functional control descriptions
- Construction phasing
- Drawing and specification review to ensure coordination and completeness

Subtask 2.4 Regulatory Coordination – Prepare and submit all required permit packages to the applicable regulatory agencies for review and approval. When necessary, the Engineer will discuss the proposed project with the applicable regulatory agencies to fully define the permit requirements and to identify the major permitting issues that must be resolved. A permitting strategy will be developed to address the major issues identified and to facilitate the permit acquisition process. Applications for the required permits and approvals will be prepared for submittal to the respective agencies. It is anticipated that the following permits will be required:

- NC DEQ NPDES Wastewater Authorization-to-Construct (ATC
- Building and Electrical Permit(s)

ENGINEER will pay any fees associated with permits and invoice such fees under reimbursable expenses.

TASK NO. 3 – Bid Phase Services

Subtask 3.1 Issue Bid Documents – ENGINEER will deliver one hard copy of the bid documents along with an electronic (PDF) copy to the OWNER and issue additional copies of the documents to prospective bidders, subcontractors, major suppliers, and others authorized by the OWNER.

Subtask 3.2 Pre-Bid Meeting – ENGINEER will attend a pre-bid meeting to describe the project and the requirements of the Contract Documents to interested bidders and respond to questions concerning the project.

Subtask 3.3 Bid Documents Interpretation – ENGINEER will receive and address questions from potential bidders and will develop and distribute to all plan holders addenda as are deemed necessary to clarify or modify the requirements of the Contract Documents.

Subtask 3.4 Bid Opening – ENGINEER will attend the bid opening, analyze bids, prepare a tabulation of all bids received, and prepare and submit a recommendation of award.

Subtask 3.5 Official Contract Documents – ENGINEER will prepare official Contract Documents including forms provided by the awarded contractor for execution by the OWNER and contractor.

TASK NO. 4 – Allowance for Subconsultants and Expenses

Allowance for ENGINEER: (a) to utilize subconsultants as required to perform the assessments, e.g. survey work and utility location; (b) to secure confined space entry equipment including rental and delivery to site; (c) to include reimbursable expenses as appropriate in accordance with Section 6.1.5 of the Agreement.

TASK NO. 5 – Allowance for Additional Services

Allowance for ENGINEER to perform additional services as requested by OWNER, performed only upon authorization from OWNER.

PART 3.0 OWNER'S RESPONSIBILITIES:

OWNER shall provide ENGINEER the following:

- Authorize ENGINEER to proceed, in writing.
- Clean out existing filter basin to allow ENGINEER to access structure and perform exterior and interior structure evaluation.
- Consider all sketches, drawings, maps, and other documents submitted by ENGINEER, and inform ENGINEER of any required decisions.
- Make available information on existing utilities and facilities, as may be reasonably requested by ENGINEER.

PART 4.0 PERIODS OF SERVICE:

Services as delineated previously herein shall be completed in accordance with the following tentative schedule:

Milestone Description	Estimated Date
Project Notice to Proceed	May 2026
Task No. 1 Completion	July 2026
Task No. 2 Completion	January 2027
Task No. 3 Completion	TBD

PART 5.0 PAYMENT FOR SERVICES:

ENGINEER shall be compensated for the previously delineated Basic Scope of Services in accordance with the below indicated fee summary table and associated rate schedule by employee classification. A more detailed "Labor Effort" spreadsheet (Attachment No. 1) is appended to this Task Order and is incorporated herein by reference.

Task No.	Task Description	NTE Cost Ceiling	Total
1	Preliminary Engineering Services	$53,900	$53,900
2	Detailed Design Services	$363,380	$363,380
3	Bid Phase Services	$23,470	$23,470
4	Allowance for Subconsultants and Expenses	$26,250	$26,250
5	Allowance for Additional Services	$45,000	$45,000
	TOTAL PROJECT FEE		**$512,000**

Notes:

1. Individual service category cost ceiling amounts may be re-apportioned to other service categories by OWNER if the Not-To-Exceed Cost Ceiling amount is not exceeded. Cost ceiling will not be exceeded without written amendment to this Task Order.
2. Reimbursable Expenses will be invoiced in accordance with Section 6.1.5 of the Agreement for Reimbursable Expenses and mileage will be charged at the federal rate.

Refer to Attachment No. 1 for hourly and fee breakdown. The following hourly billing rates were used for determining the fee amount:

Classification	Hourly Billing Rate
Vice President	$325
Associate Vice President	$305
Senior Associate	$295
Associate	$255
Senior Principal Engineer	$210
Principal Engineer	$195
Assistant Engineer II	$170
Assistant Engineer I	$150
Senior Principal Designer	$195
Principal Designer	$180
Administrative	$100

This Task Order is executed this date of _____.

UNION COUNTY, NORTH CAROLINA	HAZEN AND SAWYER
By: _____	By: _____
Name: Brian Matthews	Name: Michael D. Parker, P.E.
Title: County Manager	Title: Associate Vice President
Address: 500 North Main Street Suite 600 Monroe, NC 28112	Address: 9101 Southern Pine Blvd Suite 250 Charlotte, NC 28273

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 No. 1
Union County Water
Crooked Creek WRF
Filter Replacement
Projected Manhours and Associated Fee

Task No.	Description	VP (Hrs) $325	Assoc VP (Hrs) $305	Sr Assoc (Hrs) $295	Associate (Hrs) $255	Sr Princ Eng (Hrs) $210	Princ Eng (Hrs) $195	Asst Eng II (Hrs) $170	Asst Eng I (Hrs) $150	Sr Prin Des (Hrs) $195	Prin Des (Hrs) $180	Admin (Hrs) $100	Total Labor Hrs (Hrs)	Total Labor Fee ($)
1	**Preliminary Engineering Services**													
1.1	Field Evaluation		4	4	4		4	8					24	$5,560
1.1	Field Evaluation (Confined Space Entry and Equipment Rental Logistics)		4	4	4			12					24	$5,460
1.2	Technical Memorandum	8	24	16	8	8	40	80		16			200	$42,880
	Subtotal	8	32	24	16	8	44	100	0	16	0	0	248	53,900
2	**Detailed Design Services**													
2.1	Develop Detailed Drawings		80	80	80	120	120	120		300	300		1,200	$249,900
2.1	Develop Standard Detail Drawings				40						40		80	$17,400
2.2	Develop Technical Specifications		24	40	80	40	40	80				8	312	$70,120
2.3	Quality Assurance / Quality Control	8	16										24	$7,480
2.4	Regulatory Coordination		16					80					96	$18,480
	Subtotal	8	136	120	200	160	160	280	0	300	340	8	1,712	$363,380
3	**Bid Phase Services**													
3.1	Issue Bid Documents		2					6				2	10	$1,830
3.2	Pre=Bid Meeting		4					8					12	$2,580
3.3	Bid Documents Interpretation		8	8			8	16					40	$9,080
3.4	Bid Opening		4					12					16	$3,260
3.5	Official Contract Documents		8					24				2	34	$6,720
	Subtotal	0	26	8	0	0	8	66	0	0	0	4	112	$23,470
4	**Allowance for Subconsultants and Expenses**													
	Subconsultants													$10,000
	Confined Space Entry Equipment Rental and Delivery to Site													$10,000
	Expenses													$5,000
	Markup													$1,250
	Subtotal													26,250
5	**Allowance for Additional Services**													
	Allowance for Additional Services													$45,000
	Subtotal													45,000
	GRAND TOTAL	**16**	**194**	**152**	**216**	**168**	**212**	**446**	**0**	**316**	**340**	**12**	**2,072**	**$512,000**

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

File #: 26-278 **Agenda Date:** 5/18/2026

TITLE:

Agreement with Town of Waxhaw for Library Book Locker at Waxhaw Learning Center

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve the interlocal agreement with the Town of Waxhaw for the Library Book Locker Unit at the Waxhaw Learning Center.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

The Town of Waxhaw worked with the Library to determine the most effective way to provide a library service at the Waxhaw Learning Center, the former location of the Waxhaw Library. A smart book locker was selected as the preferred option due to its ease of use and cost-effective model that requires no County funding for materials or equipment. At the request of the Town of Waxhaw, and in collaboration with Union County Library, a new book locker will be installed at the Waxhaw Learning Center, located at 509 S. Providence Street, to expand convenient access to library materials for residents in the surrounding community.

The smart locker system allows patrons to pick up and return holds through a secure, self-service process with 24/7 access to reserved items. Holds placed through the library catalog are delivered to secure compartments by the library's courier, and patrons are notified when items are ready. Using a Union County library card, patrons access their assigned compartment, and items are automatically checked out upon retrieval. This model extends library access beyond regular hours while maintaining secure and efficient service.

The Town of Waxhaw will fund the purchase of the unit using a donation from the Library Association of Waxhaw (L.A.W.), oversee its installation, and cover ongoing subscription and maintenance costs. Union County Library will partner in delivering the materials and maintaining the locker as part of its services until the locker reaches its end of life.

FINANCIAL IMPACT:

None.

LIBRARY BOOK DROP-OFF/PICK-UP UNIT AGREEMENT

This Agreement is made and entered into this _____th day of _____, by and between:

Town of Waxhaw
8607 Kensington Drive
Waxhaw, NC 28173
(Hereinafter referred to as "the Town")

and

Union County 1720 Cuthbertson Road
Waxhaw, NC 28173
(Hereinafter referred to as "the Library")

Purpose:
This Agreement establishes the terms and conditions under which the Town and the Library will share responsibilities and costs of the to be donated Library Book Drop-Off/Pick-Up unit for the Waxhaw Learning Center Location.

1. Scope of the Agreement
The Town and the Library agree to jointly maintain and operate a Library Book Drop-Off/Pick-Up Unit (the "Unit") at the Waxhaw Learning Center, 509 S. Providence St, Waxhaw, NC 28173. The Unit will serve the community as a mobile Library drop-off/pick-up site. The Unit will be purchased by the Town using funds donated by the *Library Association of Waxhaw*. (L.A.W.). The Town will pay the annual subscription costs associated with the maintenance of the Unit.

Purpose: To provide the surrounding community of the Learning Center with a walkable, or close proximity location to pick-up and return library books.

2. Cost Sharing
The Town will purchase the Unit with donated funds and coordinate the installation on site at The Learning Center. The Town will own the Unit. Both parties agree to share costs associated with maintenance and operation of the Unit as follows:

The Town will be responsible for the following costs:

- Annual subscription costs, which includes a maintenance plan for the Unit

- Utilities (Power/Wifi) necessary for operation of the Unit
- On-Site Staff (for support of use of the Unit when needed)

The Library will be responsible for the following costs:

- Stocking/Restocking of the Unit
- Library Staff (when needed) associated with operation and stocking/restocking of the Unit

Payment Schedule:

The Town will pay utility bills, annual subscriptions, and Town staff associated with the Town's responsibilities and costs under the Agreement.

The Library will pay for Library staffing associated with the Library's responsibilities and costs under the Agreement.

3. Responsibilities of the Parties

The Town:

- The Town will be responsible for overseeing the procurement of permits and approvals required for the Unit. *(if any are needed)*
- The Town will be responsible for ensuring proper installation of the Unit, as well as housing the Unit once installed.
- The Town will ensure that the Unit meets all local building codes and safety regulations (if *there are any specific requirements)*
- The Town will be responsible for utilities, annual fees, and insurance of the Unit and its location.
- The Town will be responsible for any costs of repairs of the Unit, in accordance with the maintenance plant.
-

The Library:

- The Library will be responsible for stocking and removing Library's materials in the Unit while in use at The Learning Center.
- The Library will reasonably assist in promoting community partnership, involvement, and awareness of the project.

4. Timeline and Completion Date

The parties agree that the Unit will be installed and begin operation no later than May 2026. Any delays due to unforeseen circumstances, such as weather conditions or material shortages, will be communicated promptly to both parties.

5. Work Completion

Upon installation of the Unit, the Unit will belong to the Town for use at the Waxhaw Learning Center, in partnership with the Library. Any books, materials, or other property of the Library contained within the Unit shall remain the Library's property at all times.

6. Dispute Resolution

In the event of any disagreement or dispute arising from the interpretation or execution of this Agreement, the parties agree to resolve the issue through good faith discussions. If the dispute cannot be resolved through discussion, the parties agree to pursue

mediation or another mutually agreed-upon dispute resolution process before seeking legal action.

7. Termination
This Agreement will remain in effect until this Unit is no longer functional or serviceable, unless otherwise terminated as set forth herein. Once the Unit is fully installed, the Unit will be in use thereafter until either the Town or Library decide to terminate this Agreement, without cause, upon sixty (60) days' notice to the other party. The parties may mutually agree to a change in use.

8. Amendments
Any modifications or amendments to this Agreement must be made in writing and signed by authorized representatives of both the Town and the Library.

9. Indemnification
The Town agrees, to the extent permitted by applicable law, to indemnify and hold harmless the Library, its officials, directors, managers, employees, agents, and contractors from any claims, losses, or damages arising out of the design, construction, operation, or use of the Unit, except to the extent any such claim is based on the negligence or willful misconduct of the Library.

The Library agrees, to the extent permitted by applicable law, to indemnify and hold harmless the Town, its officials, directors, managers, employees, agents, and contractors from any claims, losses, or damages arising out of Library's negligence or willful misconduct associated with Library's carrying out its responsibilities under this Agreement.

10. Signatures
By signing below, both parties agree to the terms outlined in this Agreement.

Town of Waxhaw:

Signature: _____

Print Name: _____

Title: _____

Date: _____

Contact Phone Number: _____

Contact E-mail: _____

Union County:

Signature: _____

Print Name: _____

Title: _____

Date: _____

Contact Phone Number: _____

Contact E-mail: _____

Approved as to Legal Form: BTI

Town Attorney

Signature: _____

Print Name: _____

Title: _____

Date: _____

Contact Phone Number: _____

Contact E-mail: _____

File #: 26-266 **Agenda Date:** 5/18/2026

TITLE:

2026 Union County Jail Bond Referendum

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Adopt 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 2) Adopt 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.

PRIOR BOARD ACTIONS:

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 Resolution directing publication of notice of intent to apply to the Local Government Commission (LGC) authorizes the Clerk to the Board to publish in the Enquirer Journal the Notice of Intention to Apply to the LGC for approval of Union County Jail Bonds to be placed on the November 2026 election ballot.

The Resolution making certain statements of facts concerning the proposed jail bond issue and authorizing the application to the Local Government Commission presents certain findings of facts regarding the proposed bond issuance, financing, increase in taxes, marketing of bonds, estimated interest and authorizes the Finance Director to file with the LGC an application for approval of General Obligation Jail Bonds as described in the resolution.

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.

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 JAIL BONDS

***WHEREAS*,** the Board of Commissioners (the *"Board of Commissioners"*) of the County of Union, North Carolina (the *"County"*) is considering the issuance of general obligation bonds of the County which shall be for the following purpose and in the following maximum amount:

> $200,000,000 of bonds to pay the capital costs of providing for the design, construction, furnishing and equipping of a new jail facility.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners that the Clerk to the Board is hereby directed to cause a copy of the "NOTICE OF INTENTION TO APPLY TO THE LOCAL GOVERNMENT COMMISSION FOR APPROVAL OF JAIL BONDS" to be published in a newspaper of general circulation in the County.

BE IT FURTHER RESOLVED that this Resolution shall become effective on the date of its adoption.

READ, APPROVED AND ADOPTED this 18th day of May, 2026.

Clerk to the Board	Chairman

APPROVED AS TO FORM:

County Attorney

NOTICE OF INTENTION TO APPLY TO THE
LOCAL GOVERNMENT COMMISSION FOR APPROVAL OF JAIL BONDS

NOTICE IS HEREBY GIVEN of intention of the County of Union, North Carolina to file application with the Local Government Commission, Raleigh, North Carolina for its approval of the issuance of general obligation bonds of the County of Union, North Carolina which shall be for the following purpose and in the following maximum amount:

$200,000,000 of bonds to pay the capital costs of providing for the design, construction, furnishing and equipping of a new jail facility.

Any citizen or taxpayer of the County of Union, North Carolina objecting to the issuance of said bonds, within seven days after the date of publication of this notice, may file with the Local Government Commission, Longleaf Building, 3200 Atlantic Avenue, Raleigh, NC 27604, Attention: Secretary, and with the Board of Commissioners of the County of Union, North Carolina, a written statement setting forth each objection to the proposed bond issue and such statement shall contain the name and address of the person filing it.

COUNTY OF UNION, NORTH CAROLINA

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

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 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 JAIL BONDS"** adopted by the Board of Commissioners of the County of Union, North Carolina at a meeting held on the 18th day of May, 2026.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the corporate seal of said County, this the ____ day of _____, 2026.

(SEAL)

_____
Clerk to the Board of Commissioners
County of Union, North Carolina

RESOLUTION OF THE BOARD OF COMMISSIONERS OF THE COUNTY OF UNION, NORTH CAROLINA MAKING CERTAIN STATEMENTS OF FACT CONCERNING PROPOSED JAIL BOND ISSUE AND AUTHORIZING THE APPLICATION TO THE LOCAL GOVERNMENT COMMISSION

WHEREAS, the Board of Commissioners (the *"Board of Commissioners"*) of the County of Union, North Carolina (the *"County"*) is considering the issuance of bonds of the County which shall be for the following purpose and in the following maximum amount:

> $200,000,000 of bonds to pay the capital costs of providing for the design, construction, furnishing and equipping of a new jail facility.

WHEREAS, certain findings of fact by the Board of Commissioners must be presented to enable the Local Government Commission of the State of North Carolina to make certain determinations as set forth in Section 159-52 the North Carolina General Statutes, as amended.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners, meeting in open session on the 18th day of May, 2026, has made the following factual findings in regard to this matter:

A. ***Facts Regarding Necessity of Proposed Financing.*** The proposed bonds are necessary and expedient to pay the capital costs of providing for the design, construction, furnishing and equipping of a new jail facility.

B. ***Facts Supporting the Amount of Bonds Proposed.*** The sum estimated for these bonds is adequate and not excessive for the proposed purpose. Estimates for the proposed project to be financed with such bonds have been carefully analyzed and determined by persons knowledgeable about the proposed project.

C. ***Past Debt Management Procedures and Policies.*** The County's debt management procedures and policies are good and have been carried out in compliance with law. The County employs a Finance Director to oversee compliance with applicable laws relating to debt management. The Board of Commissioners requires annual audits of County finances. In connection with these audits, compliance with laws is reviewed. The County is not in default in any of its debt service obligations. The County Attorney reviews all debt-related documents for compliance with laws.

D. ***Past Budgetary and Fiscal Management Policies.*** The County's budgetary and fiscal management policies have been carried out in compliance with laws. Annual budgets are closely reviewed by the Board of Commissioners before final approval of budget ordinances. Budget amendments changing a function total or between functions are presented to the Board of Commissioners at regular Board of Commissioners meetings. The Finance Director presents financial information to the Board of Commissioners which shows budget to actual comparisons annually and otherwise as the County Manager deems necessary or as a member of the Board of Commissioners may request.

E. ***Increase in Taxes; Issuance of Debt.*** The increase in taxes, if any, necessary to service the proposed debt will not be excessive. The schedule for issuance anticipates issuing all of the bonds in one or more series during the seven years following the adoption of

the bond order.

F. ***Marketing of Bonds.*** The proposed bonds can be marketed at reasonable rates of interest.

G. ***Estimated Interest***. The assumptions to be used by the County's Finance Director in preparing the statement of disclosure to be filed with the Clerk to the Board pursuant to Section 159-55.1(a) of the General Statutes of North Carolina are reasonable.

BE IT FURTHER RESOLVED that the Board of Commissioners hereby authorizes and directs the Finance Director, or her designee, to file with the Local Government Commission an application for its approval of General Obligation Jail Bonds hereinbefore described, on a form prescribed by said Commission, and (1) to request in such application that said Commission approve the County's use of Parker Poe Adams & Bernstein LLP, as bond counsel for the County and (2) to state in such application such facts and to attach thereto such exhibits in regard to such General Obligation Jail Bonds and to the County and its financial condition, as may be required by said Commission.

BE IT FURTHER RESOLVED that this Resolution shall become effective on the date of its adoption.

READ, APPROVED AND ADOPTED this 18th day of May, 2026.

_____ _____

Clerk to the Board 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 OF THE BOARD OF COMMISSIONERS OF THE COUNTY OF UNION, NORTH CAROLINA MAKING CERTAIN STATEMENTS OF FACT CONCERNING PROPOSED JAIL BOND ISSUE AND AUTHORIZING THE APPLICATION TO THE LOCAL GOVERNMENT COMMISSION"** adopted by the Board of Commissioners of the County of Union, North Carolina at a meeting held on the 18th day of May, 2026.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed the corporate seal of said County, this the ____ day of _____, 2026.

(SEAL)

_____
Clerk to the Board of Commissioners
County of Union, North Carolina

File #: 26-267 **Agenda Date:** 5/18/2026

TITLE:

Bid Award and Contract - Union County Sheriff's Office Fueling Station

INFORMATION CONTACT:

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

ACTION REQUESTED:

1) Accept the low bidder, 2) authorize award of the contract to Rushing Contracting Group, Inc., in the amount of $391,067.20, 3) authorize the County Manager to i) negotiate and execute an agreement substantially consistent with this Agenda item and ii) terminate the agreement if deemed in the best interest of the County, each in the County Manager's discretion, and 4) adopt Resolution Providing Notice of Construction of the Union County Sheriff's Office Fueling Station.

PRIOR BOARD ACTIONS:

1) January 06, 2025, Regular Meeting, Agenda Item 25-001 Bid Award and Contract Union County Sheriff's Office Fueling Station, adopted CPO#367B and CPO#368A
2) June 02, 2025, Regular Meeting, Agenda Item 25-330 Rescinded Bid Award and Contract Union County Sheriff's Office Fueling Station

BACKGROUND:

This contract is to construct a new fueling station located at the rear of the Union County Sheriff's Office Administration building. This project was identified as a "Critical Infrastructure" project with a goal to provide an independent fuel supply for UCSO vehicles. The need was identified for this independent fuel supply during several disaster events that limited fuel supplies in the region and significantly impacted local gas stations which have served as the regular fuel supply for UCSO vehicles.

The project scope of work includes providing a 12,000-gallon fuel tank, dispensing system, and associated equipment. A three-sided enclosure will be constructed to conceal the fuel tank and provide enhanced security. The fuel management system will integrate with Union County's existing fuel management system. Other accessory work includes replacing a section of asphalt with concrete, installing speed bumps to assist spill containment and traffic calming, and installing a security camera for area surveillance.

On February 13, 2026, the Procurement Department partnered with Facilities Management to issue an Invitation for Bid IFB 2026-020 Union County Sheriff's Office Fuel Station. On March 31, 2026, five (5) responsive bids for the title project were received and processed. All bids were tabulated, reviewed, and certified by Labella Associates, PC. The bids ranged from $391,067.20 to

$716,304.06. Staff recommend that the project be awarded to the lowest responsive, responsible bidder, Rushing Contracting Group, Inc., Inc. in the amount of $391,067.20.

FINANCIAL IMPACT:

Funding is available within the adopted UC Fueling Stations capital account 40080210 to support the construction contract amount of $391,067.20.

Invitation for Bid No. 2026-020

Union County Sheriff's Office Fuel Station

Due Date: **March 31, 2026**
Time: **10:00am** Local Time
Receipt Location: Union County Procurement and Contract Management
610 Patton Avenue
Monroe, NC 28110

Non-Mandatory Pre-Bid Conference and Site Visit

Due Date: **March 10, 2026**
Time: **9:00 am** Local Time
Location: 3370 Presson Road, Monroe NC

Procurement Representative:

Juan Rodriguez-Cruz
Procurement Specialist
Procurement and Contract Management
(704) 283-3519
Juan.Rodriguez-Cruz@unioncountync.gov

Prepared by:

James Mangum
Project Manager
Facilities & Fleet Management
(704) 283-3774
James.Mangum@unioncountync.gov

PROJECT MANUAL – 100% CONSTRUCTION DOCUMENTS

IFB 2026-020

Union County Sheriff's Office Fuel Station

3370 Presson Road
Monroe, NC 28112

Architect Project No. 2241794

OWNER
UNION COUNTY, NORTH CAROLINA
500 N. MAIN STREET
MONROE, NORTH CAROLINA

Engineer
Labella Associates
Michael McCarten, PE
400 S Tryon St Suite 1300
704.941.2161

CONSTRUCTION DOCUMENTS 01.20.2026

DOCUMENT 000107 - SEALS PAGE

1.1 DESIGN PROFESSIONALS OF RECORD

A. Corporation
   1. LaBella Associates, PC
   2. Corporate Engineering #: C-0430
   3. Corporate Architectural #: 52904

B. Engineer of Record:

   1. Michael McCarten, PE
   2. License # 050139



END OF DOCUMENT 000107

UNION COUNTY, NORTH CAROLINA

Union County Sheriff's Office Fuel Station
IFB 2026-020

ADVERTISEMENT FOR BIDS

Sealed Bids for Union County Sheriff's Office Fuel Station will be **received by Union County Procurement and Contract Management,** 610 Patton Avenue, Monroe, North Carolina 28110 ***until*** **10:00 am local time on March 31, 2026,** at which time the Bids received will be publicly opened and read. Late bids will not be accepted.

If a Bid is sent by mail or other delivery system, the sealed envelope containing the Bid shall be enclosed in a separate package plainly marked on the outside with the notation "**BID ENCLOSED – IFB 2026-020-** and shall be addressed to Union County Procurement and Contract Management, Attn: Juan Rodriguez-Cruz, 610 Patton Avenue, Monroe, NC 28110.

A Non-Mandatory Pre-Bid meeting will be held on March 10, 2026, at 9:00 AM local time at 3370 Presson Road Monroe NC. Attendance at this meeting is strongly encouraged.

Scope of Work: The project scope of work includes providing a 12,000-gallon fuel tank, dispensing system, and associated equipment. A three-sided enclosure will be constructed to conceal the fuel tank. The fuel management system will integrate with Union County's existing fuel management system. Other accessory work includes replacing a section of asphalt with concrete, installing speed bumps to assist spill containment.

The Work includes coordinating with Union County Facilities and Fleet Management for access, security, and shutdowns.

Bids will be received for a single prime Contract. Bids shall be on a lump sum basis as set forth in the Bid Form.

All questions about the meaning or intent of the Bidding Documents are to be submitted in writing to the Procurement contact person listed on the cover page (Juan.Rodriguez-Cruz@unioncountync.gov**). Deadline for questions is 3:00 PM local time on March 17, 2026.** Questions will be addressed via Addenda no later than **7** days prior to bid date.

The Issuing Office for the Bidding Documents is:

Union County Procurement and Contract Management
610 Patton Avenue
Monroe NC 28110
Juan Rodriguez-Cruz
(704) 283-3519
Juan.Rodriguez-Cruz@unioncountync.gov

Prospective Bidders may examine the Bidding Documents at Union County Procurement and Contract Management at 610 Patton Avenue, Monroe, North Carolina on Mondays through Fridays between the hours of 8:00 AM and 5:00 PM and may obtain copies of the Bidding Documents from the Issuing Office as described below.

Bidding Documents are available in electronic or printed form from Duncan-Parnell via their bid room https://www.bidroom.duncan-parnell.com. Registration with Duncan-Parnell is required to obtain the bid documents. There is no charge for registration. Printed hard copies of the Bidding Documents can be ordered and shipped for an additional fee, which will depend on the number of sets, size of Drawings, applicable taxes, and shipping method selected by the prospective Bidder. The approximate costs of the Bidding Documents and shipping are non-refundable, and are as follows:

UNIONCOUNTY
north carolina

Invitation for Bid No. 2026-020

Union County Sheriff's Office Fuel Station

ADDENDUM No. 1

ISSUE DATE: February 19, 2026

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named IFB document.

The following items add to, modify, and/or clarify the IFB documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the IFB document.

Union County Sheriff's Office Fuel Station — **Union County**, Owner
Project No.: **IFB 2026-2020** — Contract Document Date: **January 20, 2026**
Issue to: **Bidders** — Addendum Date: **February 19, 2026**

A. NOTICE TO BIDDER

1.1 This Addendum is issued pursuant to the Conditions of the Contract and is hereby made part of the Contract Documents. The addendum serves to clarify, revise, and supersede information in the Project Manual, the Drawings, and previously issued Addenda. The Bidder shall acknowledge receipt of this Addendum in the appropriate space on the Bid Form. Failure to do so may subject the Bidder to disqualification. A list of attachments, if any, is part of this document.

1.2 Acknowledge receipt of this Addendum in the space provided in the Bid Form. Failure to do so may disqualify the Bidder.

1.3 The date for receipt of bids for this project **is unchanged by this Addendum.** Sealed Bids for Union County Sheriff's Office Fuel Station will be **received by the Union County Procurement Department *until* 10:00 AM local time on March 31, 2026** at the Union County Procurement Department, 610 Patton Avenue, Monroe, NC 28110.

1.4 All questions about the meaning or intent of the Bidding Documents are to be submitted in writing to the Procurement contact person listed on the cover page (Juan.Rodriguez-Cruz@unioncountync.gov). **Deadline for new questions/substitution is 3:00 PM local time on March 17, 2026**. Questions will be addressed via Addenda no later than seven calendar days prior to the date for receipt of bids. All addenda and any associated contract document revisions will be posted to the following websites: Union County, NC State IPS, Duncan Parnell Planroom.

B. QUESTION AND ANSWER SECTION

1.5 None.

C. MODIFICATIONS TO DRAWINGS

1.6 None.

D. MODIFICATIONS TO SPECIFICATIONS

1.7 Please be advised that the TECHNICAL specifications include the following changes. The Seals page has been revised to professional engineer Michael McCarten, PE with LaBella Associates.

Advertisement for Bids: Duncan Parnell approximate costs of the Bidding Documents and shipping are non-refundable, and are as follows:

- Download (PDF) $81.00 plus tax
- Printed Set & Digital Set $108.00 plus tax

E. ATTACHMENTS

1.8 Revised Seals Page.

Revised Advertisement for Bids.

END OF ADDENDUM

DOCUMENT 000107 - SEALS PAGE

1.1 DESIGN PROFESSIONALS OF RECORD

A. Corporation
   1. LaBella Associates, PC
   2. Corporate Engineering #: C-0430
   3. Corporate Architectural #: 52904

B. Engineer of Record:

   1. Michael McCarten, PE
   2. License # 050139



END OF DOCUMENT 000107

UNIONCOUNTY
north carolina

Invitation for Bid 2026-020

Union County Sheriff's Office Fuel Station

ADDENDUM No. 2

ISSUE DATE: March 24, 2026

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named IFB document.

The following items add to, modify, and/or clarify the IFB documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the IFB document.

Union County Sheriff's Office Fuel Station | **Union County**, Owner
Project No.: **IFB 2026-2020** | Contract Document Date: **January 20, 2026**
Issue to: **Bidders** | Addendum Date: **March 19, 2026**

A. NOTICE TO BIDDER

1.1 This Addendum is issued pursuant to the Conditions of the Contract and is hereby made part of the Contract Documents. The addendum serves to clarify, revise, and supersede information in the Project Manual, the Drawings, and previously issued Addenda. The Bidder shall acknowledge receipt of this Addendum in the appropriate space on the Bid Form. Failure to do so may subject the Bidder to disqualification. A list of attachments, if any, is part of this document.

1.2 Acknowledge receipt of this Addendum in the space provided in the Bid Form. Failure to do so may disqualify the Bidder.

1.3 The date for receipt of bids for this project **is unchanged by this Addendum.** Sealed Bids for Union County Sheriff's Office Fuel Station will be **received by the Union County Procurement Department *until* 10:00 AM local time on March 31, 2026** at the Union County Procurement Department, 610 Patton Avenue, Monroe, NC 28110.

1.4 All questions about the meaning or intent of the Bidding Documents are to be submitted in writing to the Procurement contact person listed on the cover page (Juan.Rodriguez-Cruz@unioncountync.gov). **Deadline for new questions/substitution is 3:00 PM local time on March 17, 2026**. Questions will be addressed via Addenda no later than seven calendar days prior to the date for receipt of bids. All addenda and any associated contract document revisions will be posted to the following websites: Union County, NC State IPS, Duncan Parnell Planroom.

B. QUESTION AND ANSWER SECTION

1.5 General/Contract Requirements

Q1: Are subcontractor bonds required at a certain value or scope?

A1: Subcontractor bonds are not explicitly required by the Contract Documents. Bonding requirements apply to the Prime Contractor. Subcontractor bonding, if required, shall be at the discretion of the Prime Contractor.

Q2: Can a checklist of required bid documents be provided?

A2: No separate checklist will be provided. Bidders are responsible for including all required documents in their bid package as outlined in the Instructions to Bidders. A Bid Form will be provided, but it is the bidder's responsibility to ensure all other required documents are submitted.

Q3: Is the 10% minority participation a goal or a requirement?

A3: The 10% minority participation is a goal. Bidders are required to demonstrate good faith efforts in accordance with the project requirements.

Q4: What permits will be required for this project?

A4: The Contractor shall obtain all required permits, including but not limited to building, electrical, and fuel system permits, as required by the Authority Having Jurisdiction (AHJ).

Q5: What is the Owner contingency referenced in the bid form?

A5: The Owner contingency is an allowance carried within the bid form for Owner-directed use. It shall be included as a separate line item as indicated in the Bid Form and is not to be included within the Contractor's base bid price.

Q6: What is expected for bid submission (documents vs full spec book, bonds, etc.)?

A6: Bidders shall submit completed bid forms and all required documentation as outlined in the project manual, including bid security. Full specification books are not required to be resubmitted.

Q7: Will pre-bid notes be issued?

A7: Responses to pre-bid questions will be issued via addendum. Separate meeting minutes will not be issued.

Q8: Can a list of plan holders or GCs be provided?

A8: Plan holder information is available through the Duncan Parnell bid room. The Engineer will not distribute separate bidders lists.

1.5.1 Architectural/Structural

Q9: Please confirm final CMU wall height.

A9: CMU walls are intended for visual screening and containment. Provide wall height to match the height of the fuel tank, with a minimum height of 10’-0”.

Q10: Confirm extents of asphalt removal and replacement.

A10: Asphalt removal and replacement with concrete shall be limited to the fueling area. The fueling area is defined as the area within the extents of the wall enclosure and extending across the drive aisle to the existing curb. This shall be a continuous paving area between the proposed speed bumps. Refer to Sheet M101 for depiction of limits.

Q11: Confirm subbase thickness for concrete paving and tank slab.

A11: Concrete thicknesses are as follows:

- Tank slab: 8 inches thick
- Concrete paving: 6 inches thick

Subbase requirements shall be as indicated in the structural drawings and details.

Q12: Are vapor barriers required?

A12: Vapor barriers are not required for exterior concrete work. Vapor barriers shall only be provided where specifically indicated for interior slabs.

1.5.2 Site/Civil/Utilities

Q13: Will routing of underground utilities outside the fenced area be permitted?

A13: Utility routing shall generally remain within the project limits as shown. Any proposed deviations shall be submitted to the Owner and Engineer for review and approval.

1.5.3 Fuel System/Mechanical

Q14: What size are the fill and dispenser line connections?

A14: The remote fill system, Franklin Fueling Systems Model RFBP-REAR, shall have 3-inch inlet and outlet connections. Downstream piping, pump, and dispenser connections shall be coordinated with the fuel system manufacturer and equipment supplier.

Q15: What piping material is required (carbon vs stainless)?

A15: Provide carbon steel piping for fill, supply, and vent piping systems in accordance with applicable codes and manufacturer requirements.

Q16: If carbon steel is used, what coating system is required?

A16: Carbon steel piping shall be protected with an industry-standard corrosion protection system suitable for exterior fuel service. This shall include, at a minimum, a shop-applied primer and field-applied epoxy or equivalent coating system. Where piping is buried or in contact with soil or concrete, provide additional protection such as wrapping or coatings in accordance with applicable standards and manufacturer recommendations.

Q17: Are connections flanged, threaded, or welded?

A17: Piping shall be primarily welded. Threaded or flanged connections may be used where required for equipment connections and maintenance access, in accordance with manufacturer requirements and applicable codes.

Q18: What type/brand of dispenser is required?

A18: Provide a fuel dispensing system compatible with the specified fuel management system and remote fill components, including coordination with Franklin Fueling Systems equipment and a dispenser pedestal such as Morrison Bros. Co. Model 434, or approved equal.

Q19: What are dispenser requirements (flow rate, hoses, finish)?

A19: Provide a standard commercial fleet fueling dispenser with the following basis of design:
- Standard flow rate, approximately 60 GPM
- Single hose configuration

Final configuration shall be coordinated with the fuel system manufacturer and approved through submittals.

Q20: Is the Hi-Link Level Shield required or only OPW level sensor?

A20: Provide tank monitoring equipment consisting of:
- OPW Fueling Components 200TG mechanical tank gauge
- OPW 444TA tank alarm
- OPW 144TA liquid level alarm

Additional monitoring systems are not required unless specifically indicated.

1.5.4 Fuel Management System

Q21: What is the existing fuel management system and how does integration occur?

A21: Provide a fuel management system consisting of the Syntech Systems FuelMaster 4000 Series. The system shall include a wired connection to the Sheriff's Office telecommunications infrastructure and shall integrate with the County's existing WEX fuel card system. Contractor shall coordinate all integration requirements with the Owner, equipment supplier, and service providers.

1.5.5 Procurement/Materials

Q22: Are Buy American requirements applicable?

A22: Materials shall comply with applicable federal, state, and local procurement requirements. No additional Buy American requirements are specified unless noted otherwise in the Contract Documents.

1.5.6 Bid Form/Alternates

Q23: Clarification on alternates (wall appears in base bid in one location).

A23: The wall enclosure is required as part of the base bid. Alternates apply to the type of wall construction, including options such as standard painted CMU versus split-face CMU with integral color, as identified in the Contract Documents.

END OF ADDENDUM

BID TABULATION FORM
Bid Opening Date: 3/31/26

IFB 2026-020- UNION COUNTY SHERIFF FUEL STATION

UNION COUNTY, NC

UNIONCOUNTY north carolina

LaBella Powered by partnership

CONTRACTOR	GC License #	ADD -1 Y/N	ADD-2 Y/N	BID BOND	BASE BID	CONTINGENCY ALLOWANCE	TOTAL BID	ALTERNATE 1	Alt 1 # of Days	ALTERNATE 2	Alt 2 # of Days	ALTERNATE 3	Alt 3 # of Days	Non-Collusion Affidavit	Equal Opportunity Employment Affidavit	Identify HUB Certified Minority	Affidavit A / B Listing of Good Faith Efforts
DAP Contracting Inc. Disqualified	99942	y	y	y	$700,999.00	$70,100.00	$771,099.00	$10,700.00		$12,232.00		$7,941.99		y	y	n	y
J & K General Contractors	78272	y	y	y	$377,499.99	$37,749.99	$415,249.98	$24,036.00		$3,550.00		$5,730.00		y	y	y n/a	y
JD Goodrum General Contractors	19284	y	y	y	$597,829.96	$59,783.00	$657,612.96	$12,736.10		$13,130.00		$32,825.00		y	y	y none	y
MC Moore Construction LLC	84150	y	y	y	$433,916.00	$43,391.00	$477,307.00	$9,500.00		$5,000.00		$4,000.00		y	y	y 1	y
Miles-McClellan Construction Company Inc.	63358	y	y	y	$431,000.00	$43,100.00	$474,100.00	$10,719.00		$3,757.00		$6,180.00		y	y	y 1	y
Rushing Contracting Group Inc.	85622	y	y	y	$338,682.00	$33,868.20	$372,550.20	$10,392.00		$2,875.00		$5,250.00		y	y	y none	y
SPATCO Energy Solutions Disqualified	83734	n	n	y	$314,894.20		$314,894.20	$0.00		$0.00		$0.00		y	n	n	n
					Questionable on fee presented												

Certified True Bids as Received:
LABELLA ASSOCIATES

Michael McCarten, PE
4/16/2026

BID INFORMATION

Name of Bidder: Rushing Contracting Group, Inc.

Date: 3-16-2026

Project Name: Union County Sheriff's Office Fuel Station

Owner: Union County

Owner Project Number: IFB 2026-020

Designer: Michael McCarten at Labella Associates

Designer Project Number: 2241794

CERTIFICATIONS OF BASE BID

The undersigned Bidder, hereby declares that he has carefully investigated the scope of work and having thoroughly familiarized himself with the Contract Documents relative hereto, and has read all special provisions furnished prior to the opening of the bids; that he has satisfied himself relative to the work to be performed. The bidder further declares that he and his sub-contractors have fully complied with NCGS 64, Article 2 in regards to E-Verification as required by N.C. General Statute 143-129(j). The bidder agrees to hold the proposed bid price for 90 days.

The bidder proposes and agrees if this proposal is accepted, to contract with Union County Government, in the form of contract specified, to provide all necessary labor, equipment, materials, machinery, tools, apparatus, transportation, services, fees, permits, etc., to complete the construction of Union County Sheriff's Office Fuel Station all in accordance with the aforementioned Contract Documents to the full and entire satisfaction of Union County Government, with definite understanding that no money will be allowed for extra work except as set forth in the General Conditions and the Contract Documents for the lump sum of:

Provide 10% of the base bid price as an Owner contingency allowance. Any funds not used from the Owner's contingency allowance will be returned to the Owner by deduct change order.

BASE BID PRICE:

Quantity	Model No.	Description	Bid
1		**Cost to provide and install Above ground Highland Fuel Tank 12,000 gallons and Dispensing System as shown on the plans and specifications.**	$181,020.00
1		**Cost of material and labor to construct a Three-Sided CMU Enclosure wall with Protective Bollard as shown on the plans and specifications**	$54,130.00
1		**Cost of material and labor to provide and install all Remaining Scope of work as shown on the plans and specifications**	$103,532.00
		Total Base Bid	$338,682.00

TOTAL BASE BID

three hundred thirty eight thousand six hundred eighty two dollars & 0/100 Dollars ($ 338,682.00).

A) OWNERS CONTINGENCY ALLOWANCE:

thirty three thousand eight hundred sixty eight dollars & 20/100 Dollars ($ 33,868.20).

B) TOTAL BASE BID PRICE WITH OWNER CONTINGENCY (A+B=C):

three hundred seventy two thousand five hundred fifty dollars & 20/100 Dollars ($ 372,550.20).

The above amount may be modified by the included Unit Prices and Alternates at the Owner's sole discretion.

SUB-CONTRACTOR LIST:

The following shall execute subcontracts with the Bidder for the portion of the work indicated:

Specialty Work Sub-Contractor (Name & License No.):
Bowers Electric License No. 23808

Specialty Work Sub-Contractor (Name & License No.):
Phoenix Pump, Inc. License No. Tank & Pump Supplier

ALTERNATES:

1. Split-Face CMU Encloser Wall with Integral Color
ten thousand three hundred ninety two dollars & 0/100 Dollars ($ 10,392.00)
2. JE Adams 8685-2FG Air Machine w/Gast compressor pedestal mount
two thousand eight hundred seventy five dollars & 0/100 Dollars ($ 2,875.00)
3 Two (2) Security Cameras (AXIS P4707-PLVE Dual Lens).
five thousand two hundred fifty dollars & 0/100 Dollars ($ 5,250.00)

TIME OF COMPLETION

The undersigned Bidder proposes and agrees hereby to commence the Work of the Contract Documents on a date specified in a written Notice to Proceed to be issues by Owner and shall fully complete the Work within One Hundred-Fifty [150] **calendar days**

LIQUIDATED DAMAGES:

The undersigned further agrees, stipulates, and fixes as Liquidated Damages if delayed, but not as a penalty, the sum of **Two Hundred Fifty Dollars ($250.00)** per calendar day that the undersigned together with the undersigned's surety shall pay the Owner for each calendar day or part thereof that expires after the date specified for the substantial completion of the work and until the Work is Substantially complete. By bidding, the undersigned hereby agrees to be responsible for liquidated damages.

BID SECURITY:

Accompanying this proposal is a bid security five percent (5%) of the Total Bid Price Sum in accordance with Instructions to Bidders in the form of (check one):

☐ Bid Bond (AIA Document A310-2010), or

☐ Cashier's Check, or Certified Check.

AIA® Document A310™ – 2010

Bid Bond

CONTRACTOR:
(Name, legal status and address)
Rushing Contracting Group Inc
3819 Old Camden Rd.
Monroe, NC 28110

SURETY:
(Name, legal status and principal place of business)
Granite Re, Inc.
14001 Quailbrook Drive
Oklahoma City, OK 73134

OWNER:
(Name, legal status and address)
Union County, North Carolina
500 North Main Street
Monroe NC 28112

BOND AMOUNT: $ Five Percent of Amount Bid (5% of Bid)

PROJECT:
(Name, location or address, and Project number, if any)
IFB 2026-020
Union County Sheriff's Office Fuel Station
3370 Presson Road
Monroe NC 28112

The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted here from and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. When so

ADDITIONS AND DELETIONS:
The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable.

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User Notes:
(947547716)

furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

Signed and sealed this 31st day of March , 2026

Megan Long
(Witness)

Lydia Case
(Witness) Lydia Case

Rushing Contracting Group Inc
(Contractor as Principal) *(Seal)*

(Title) Pres.dent

Granite Re, Inc.
(Surety) *(Seal)*

(Title) Matthew Rose, Attorney-in-Fact

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User Notes: (947547716)

GRANITE RE, INC.

GENERAL POWER OF ATTORNEY

Know all Men by these Presents:

That GRANITE RE, INC., a corporation organized and existing under the laws of the State of MINNESOTA and having its principal office at the City of OKLAHOMA CITY in the State of OKLAHOMA does hereby constitute and appoint:

TYLER TURNBULL; SCOTT PELIN; MATTHEW ROSE; BRETT BRANTON; BEVERLY IVEY; DELLA CASE; MICHELE MILLER; JAMES SOUSA its true and lawful Attorney-in-Fact(s) for the following purposes, to wit:

To sign its name as surety to, and to execute, seal and acknowledge any and all bonds, and to respectively do and perform any and all acts and things set forth in the resolution of the Board of Directors of the said GRANITE RE, INC. a certified copy of which is hereto annexed and made a part of this Power of Attorney; and the said GRANITE RE, INC. through us, its Board of Directors, hereby ratifies and confirms all and whatsoever the said:

TYLER TURNBULL; SCOTT PELIN; MATTHEW ROSE; BRETT BRANTON; BEVERLY IVEY; DELLA CASE; MICHELE MILLER; JAMES SOUSA may lawfully do in the premises by virtue of these presents.

In Witness Whereof, the said GRANITE RE, INC. has caused this instrument to be sealed with its corporate seal, duly attested by the signatures of its President and Assistant Secretary, this 31st day of July, 2023.

Kenneth D. Whittington, President

Kyle P. McDonald, Assistant Secretary

STATE OF OKLAHOMA)
) SS:
COUNTY OF OKLAHOMA)

On this 31st day of July, 2023, before me personally came Kenneth D. Whittington, President of the GRANITE RE, INC. Company and Kyle P. McDonald, Assistant Secretary of said Company, with both of whom I am personally acquainted, who being by me severally duly sworn, said, that they, the said Kenneth D. Whittington and Kyle P. McDonald were respectively the President and the Assistant Secretary of GRANITE RE, INC., the corporation described in and which executed the foregoing Power of Attorney; that they each knew the seal of said corporation; that the seal affixed to said Power of Attorney was such corporate seal, that it was so fixed by order of the Board of Directors of said corporation, and that they signed their name thereto by like order as President and Assistant Secretary, respectively, of the Company.

My Commission Expires:
April 21, 2027
Commission #: 11003620

Notary Public

GRANITE RE, INC.

Certificate

THE UNDERSIGNED, being the duly elected and acting Assistant Secretary of Granite Re, Inc., a Minnesota Corporation, HEREBY CERTIFIES that the following resolution is a true and correct excerpt from the July 15, 1987, minutes of the meeting of the Board of Directors of Granite Re, Inc. and that said Power of Attorney has not been revoked and is now in full force and effect.

"RESOLVED, that the President, any Vice President, the Assistant Secretary, and any Assistant Vice President shall each have authority to appoint individuals as attorneys-in-fact or under other appropriate titles with authority to execute on behalf of the company fidelity and surety bonds and other documents of similar character issued by the Company in the course of its business. On any instrument making or evidencing such appointment, the signatures may be affixed by facsimile. On any instrument conferring such authority or on any bond or undertaking of the Company, the seal, or a facsimile thereof, may be impressed or affixed or in any other manner reproduced; provided, however, that the seal shall not be necessary to the validity of any such instrument or undertaking."

IN WITNESS WHEREOF, the undersigned has subscribed this Certificate and affixed the corporate seal of the Corporation this 31st day of March, 2026.

Kyle P. McDonald, Assistant Secretary

GR0800-1

RECIEPT OF ADDENDA:
The undersigned acknowledges receipt of the following addenda which will be considered as part of the contract Documents:

Addendum No. 1 Dated 2-19-26 Addendum No. _____ Dated _____
Addendum No. 2 Dated 3-24-26 Addendum No. _____ Dated _____
Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

CONTRACTOR'S LICENSE:

The undersigned further states that it is a duly licensed contractor for the proposed work in the State of North Carolina, and that all fees, permits, etc. pursuant to submitting this proposal have been paid in full.

ACKNOWLEDGEMENT AND REPRESENTATIONS:

If notice of acceptance of this bid is given to the undersigned within 90 days after the date of opening of bids, or any time thereafter before this bid is withdrawn, the undersigned will execute and deliver an Agreement in the prescribed form promptly after is has been presented to him for signature. Certificates of Insurance and Performance and Payment bonds shall be furnished to the Owner at the execution of this agreement and as required by North Carolina General Statutes.

The undersigned bidder agrees to submit evidence in affidavit form of applicable experience, adequate financial resources, work in hand capacity, adequate organization, and acceptable past performance. Submittal will be in the form of AIA Document A305 Contractor's Qualification Statement. Bidder's qualifications information shall be considered confidential.

The undersigned bidder certifies the neither he/she, nor any official, agent or employee has entered into any agreement, participated in any collusion, or otherwise taken any action which is in restraint of free competitive bidding in conjunction with this bid. The person signing this bid form represents that he/she has full authority and representative capacity to execute this Bid Form in the capacity indicated below.

The undersigned agrees that in the case of failure on his part to execute the said contract and the bond within ten (10) consecutive calendar days after written notice being given of the award of contract, the certified check, cash or bid bond accompanying this bid shall be paid into the funs of the Owner's account set aside for the Project, as liquidated damages for such failure; otherwise, the certified check, cash or bid bond accompanying the Proposal shall be returned to the undersigned.

The undersigned bidder agrees that they are expected to act as Project Expediter and coordinate work of all other contractors.

The firm signing this bid and registered under that name is legally qualified to perform all work included in the scope of the contract as determined by the State of North Carolina, in granting the registration.

PROPOSAL SIGNATURE:

Respectfully submitted this 16 day of March, 2026.

Rushing Contracting Group, INC.
(Name of firm or corporation making bid)

By: [signature] Matthew Seth Rushing
Signature and Typed Name

Title: President / Owner

Address of Bidder: 3819 Old Camden Rd
Monroe, NC 28110

Bidders N.C. Contractor License No. 85622

Type of License: General Contracting – Building

Limitations: Unlimited

Attest:

By: Lisa Rushing

Title: Office Manager

END OF DOCUMENT 00 41 13

State of North Carolina AFFIDAVIT A – Listing of Good Faith Efforts

County of Union

Affidavit of Rushing Contracting Group, Inc. (Name of Bidder)

I have made a good faith effort to comply under the following areas checked:

Bidders must earn at least 50 points from the good faith efforts listed for their bid to be considered responsive. (1 NC Administrative Code 30 I.0101)

- ☐ **1 – (10 pts)** Contacted minority businesses that reasonably could have been expected to submit a quote and that were known to the contractor, or available on State or local government maintained lists, at least 10 days before the bid date and notified them of the nature and scope of the work to be performed.
- ☑ **2 --(10 pts)** Made the construction plans, specifications and requirements available for review by prospective minority businesses, or providing these documents to them at least 10 days before the bids are due.
- ☑ **3 – (15 pts)** Broken down or combined elements of work into economically feasible units to facilitate minority participation.
- ☐ **4 – (10 pts)** Worked with minority trade, community, or contractor organizations identified by the Office of Historically Underutilized Businesses and included in the bid documents that provide assistance in recruitment of minority businesses.
- ☑ **5 – (10 pts)** Attended prebid meetings scheduled by the public owner.
- ☐ **6 – (20 pts)** Provided assistance in getting required bonding or insurance or provided alternatives to bonding or insurance for subcontractors.
- ☑ **7 – (15 pts)** Negotiated in good faith with interested minority businesses and did not reject them as unqualified without sound reasons based on their capabilities. Any rejection of a minority business based on lack of qualification should have the reasons documented in writing.
- ☐ **8 – (25 pts)** Provided assistance to an otherwise qualified minority business in need of equipment, loan capital, lines of credit, or joint pay agreements to secure loans, supplies, or letters of credit, including waiving credit that is ordinarily required. Assisted minority businesses in obtaining the same unit pricing with the bidder's suppliers in order to help minority businesses in establishing credit.
- ☐ **9 – (20 pts)** Negotiated joint venture and partnership arrangements with minority businesses in order to increase opportunities for minority business participation on a public construction or repair project when possible.
- ☐ **10 - (20 pts)** Provided quick pay agreements and policies to enable minority contractors and suppliers to meet cash-flow demands.

The undersigned, if apparent low bidder, will enter into a formal agreement with the firms listed in the Identification of Minority Business Participation schedule conditional upon scope of contract to be executed with the Owner. Substitution of contractors must be in accordance with GS143-128.2(d) Failure to abide by this statutory provision will constitute a breach of the contract.

The undersigned hereby certifies that he or she has read the terms of the minority business commitment and is authorized to bind the bidder to the commitment herein set forth.

Date: 3-16-26 Name of Authorized Officer: Matthew Seth Rushing

Signature: [signature]

Title: President

RUSHING CONTRACTING GROUP INC NORTH CAROLINA CORPORATE SEAL 2018

State of NC, County of Union

Subscribed and sworn to before me this 16th day of March 2026

Notary Public Lisa P. Rushing

My commission expires 5-27-2029

LISA P RUSHING
Notary Public - North Carolina
Union County
My Commission Expires May 27, 2029

State of North Carolina --AFFIDAVIT B-- Intent to Perform Contract with Own Workforce.

County of Union

Affidavit of Rushing Contracting Group, Inc.
(Name of Bidder)

I hereby certify that it is our intent to perform 100% of the work required for the Union County Sheriff's Office Fuel Station contract.
(Name of Project)

In making this certification, the Bidder states that the Bidder does not customarily subcontract elements of this type project, and normally performs and has the capability to perform and will perform all elements of the work on this project with his/her own current work forces; and

The Bidder agrees to provide any additional information or documentation requested by the owner in support of the above statement. The Bidder agrees to make a Good Faith Effort to utilize minority suppliers where possible.

The undersigned hereby certifies that he or she has read this certification and is authorized to bind the Bidder to the commitments herein contained.

N/A

We will Sub-contract a portion of work.

Date: 3/16/26 Name of Authorized Officer: _____

Signature: _____

Title: President

RUSHING CONTRACTING GROUP INC CORPORATE SEAL 2018 NORTH CAROLINA

State of NC, County of Union

Subscribed and sworn to before me this 16th day of March, 20 26

Notary Public Lisa P. Rushing

My commission expires 5-27-2029

LISA P RUSHING
Notary Public - North Carolina
Union County
My Commission Expires May 27, 2029

Certification of Document's Authenticity

AIA® Document D401™ – 2003

I, , hereby certify, to the best of my knowledge, information and belief, that I created the attached final document simultaneously with its associated Additions and Deletions Report and this certification at 14:46:39 on 02/09/2026 under Order No. 20250142948 from AIA Contract Documents software and that in preparing the attached final document I made no changes to the original text of AIA® Document A310™ – 2010, Bid Bond, other than those additions and deletions shown in the associated Additions and Deletions Report.

(Signed)

President / Owner

(Title)

3-16-26

(Dated)

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User Notes: (947547716)

Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid Attach to Bid

Identification of HUB Certified/ Minority Business Participation

I, Rushing Contracting Group, Inc.
(Name of Bidder)

do hereby certify that on this project, we will use the following HUB Certified/ minority business as construction subcontractors, vendors, suppliers or providers of professional services.

Firm Name, Address and Phone #	Work Type	*Minority Category	**HUB Certified (Y/N)
Do not have any minority participation			
Specialty Contractor Job, could not find minority Subs for these type of Trades			

*Minority categories: Black, African American (**B**), Hispanic (**H**), Asian American (**A**) American Indian (I), Female (**F**) Socially and Economically Disadvantaged (**D**)

**** HUB Certification with the state HUB Office required to be counted toward state participation goals.**

The total value of minority business contracting will be ($) 0 .

STATE OF NORTH CAROLINA

AFFIDAVIT

UNION COUNTY

NOW COMES Affiant, first being sworn, deposes and says as follows:

1. I, being duly authorized by and on behalf of Rushing Contracting Group, Inc. ("Contractor"), have bid on an agreement with Union County, North Carolina ("Union");

2. As part of my duties and responsibilities pursuant to said agreement, I attest that I am aware of and in compliance with the requirements of E-Verify, Article 2 of Chapter 64 of the North Carolina General Statutes, to include (mark which applies):

___ After hiring an employee to work in North Carolina, I verify the work authorization of said employee through E-Verify and retain the record of the verification of work authorization while the employee is employed and for one year thereafter; or

✓ I employ fewer than twenty-five (25) employees in the State of North Carolina.

3. As part of my duties and responsibilities pursuant to said agreement, I attest that to the best of my knowledge any subcontractors employed as a part of this agreement are in compliance with the requirements of E-Verify, Article 2 of Chapter 64 of the North Carolina General Statutes, to include (mark which applies):

___ After hiring an employee to work in North Carolina, the subcontractor verifies the work authorization of said employee through E-Verify and retains the record of the verification of work authorization while the employee is employed and for one year thereafter; or

___ The subcontractor employs fewer than twenty-five (25) employees in the State of North Carolina. Specify subcontractor: _____

This the 16 day of March, 2026.

Affiant

Matthew Seth Rushing
Printed Name

Sworn to and subscribed before me, this the 16th day of March, 2026

LISA P RUSHING
Notary Public - North Carolina
Union County
[OFFICIAL SEAL]
My Commission Expires May 27, 2029

Lisa P. Rushing, Notary Public

My Commission Expires: 5-27-2029

NON-COLLUSION AFFIDAVIT

STATE OF NORTH CAROLINA
COUNTY OF UNION

I Matthew Seth Rushing, being first duly sworn, deposes and says that:

1. He/She is the President of Rushing Contracting Group, the Bidder that has submitted the attached Bid;

2. He/She is fully informed respecting the preparation and contents of the attached Bid and of all pertinent circumstances respecting such Bid;

3. Such Bid is genuine and is not a collusive or sham bid;

4. Neither the said Bidder nor any of its officers, partners, owners agents, representatives, employees or parties of interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly, with any other bidder, firm or person to submit a collusive or sham bid in connection with the contract for which the attached Bid has been submitted or to refrain from bidding in connection with such contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other bidder, firm or person to fix the price or prices in the attached bid or of any other bidder, or to fix any overhead, profit or cost element of the bid price of any other bidder or to secure through collusion, conspiracy, connivance or unlawful agreement any advantage against the Owner or any person interested in the proposed contract; and

5. The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

President
TITLE

Subscribed and sworn before me, this 16th day of March, 2026

Notary Public Lisa P. Rushing

My Commission Expires 5-27-2029 END OF DOCUMENT 00 45 19

LISA P RUSHING
Notary Public - North Carolina
Union County
My Commission Expires May 27, 2029

Expiration Date

2026

License No.

85622

North Carolina

Licensing Board for General Contractors

This is to Certify That:

Rushing Contracting Group Inc

Monroe, NC

is duly registered and entitled to practice

General Contracting

Limitation: Unlimited

Classification: Building

until

December 31, 2026

when this Certificate expires.

Witness our hands and seal of the Board.

Dated, Raleigh, N.C.

01/01/2026

This certificate may not be altered.

LICENSING BOARD FOR GENERAL CONTRACTORS · NORTH CAROLINA · MAY 20, 1775

Chairman

Secretary-Treasurer

391

ACORD

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 03/13/2026

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	Rogers Insurance Solutions 3302 A West Highway 74 Monroe, NC 28110 License #: 3001702305
CONTACT NAME:	Paige Ransom
PHONE (A/C, No, Ext):	(980)313-8211
FAX (A/C, No):	(980)269-8082
E-MAIL ADDRESS:	paige@rogersinsurancesolution.com
INSURED	The Rushing Contracting Group Lisa Rushiing 3819 Old Camden Rd Monroe, NC 28110-9740

INSURER(S) AFFORDING COVERAGE		NAIC #
INSURER A :	Frankenmuth Insurance Company	13986
INSURER B :	INSURANCE COMPANY OF THE WEST	19593
INSURER C :		
INSURER D :		
INSURER E :		
INSURER F :		

COVERAGES **CERTIFICATE NUMBER:** 00001902-250326110617 **REVISION NUMBER:** 33

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. *LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. LIMITS SHOWN ARE INCLUSIVE OF AMOUNTS REQUESTED BY THE CERTIFICATE HOLDER AND MAY NOT REFLECT POLICY LIMIT AMOUNTS IN EXCESS OF THOSE REQUESTED. ***Not Applicable In WY**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE [X] OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY [ ] PRO-JECT [ ] LOC OTHER:	Y	Y	6879991	04/01/2026	04/01/2027	EACH OCCURRENCE	$	1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$	1,000,000
							MED EXP (Any one person)	$	10,000
							PERSONAL & ADV INJURY	$	1,000,000
							GENERAL AGGREGATE	$	2,000,000
							PRODUCTS - COMP/OP AGG	$	2,000,000
								$	
A	AUTOMOBILE LIABILITY X ANY AUTO OWNED AUTOS ONLY [ ] SCHEDULED AUTOS X HIRED AUTOS ONLY [X] NON-OWNED AUTOS ONLY	Y	Y	6879990	04/01/2026	04/01/2027	COMBINED SINGLE LIMIT (Ea accident)	$	1,000,000
							BODILY INJURY (Per person)	$	
							BODILY INJURY (Per accident)	$	
							PROPERTY DAMAGE (Per accident)	$	
								$	
A	X UMBRELLA LIAB [X] OCCUR EXCESS LIAB [ ] CLAIMS-MADE DED X RETENTION $ 10,000			6879991	04/01/2026	04/01/2027	EACH OCCURRENCE	$	5,000,000
							AGGREGATE	$	5,000,000
								$	
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N [ ] If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		WNC 5083343 00	04/01/2026	04/01/2027	X PER STATUTE [ ] OTH-ER		
							E.L. EACH ACCIDENT	$	1,000,000
							E.L. DISEASE - EA EMPLOYEE	$	1,000,000
							E.L. DISEASE - POLICY LIMIT	$	1,000,000
A	Leased/Rented Equip			6879991	04/01/2026	04/01/2027	Deductible		750,0

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Union County is listed as an additional insured in regards to general and auto liability in accordance with the terms and conditions of the policy. Umbrella is follow form.
Project: Union County Sheriff's Office Fuel Station

CERTIFICATE HOLDER

Union County
Union Government Center
500 N. Main St.
Monroe, NC 28112

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Abigail Ransom

(APR)

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April 28, 2026

James Mangum Jr
Project Manager | Facilities & Fleet Management
Union County Government
1407 Airport Road
Monroe, NC 28110

Re: Recommendation of Award
Union County Sheriff's Fuel Station
IFB #2026-020

Dear Mr. Mangum:

On March 31, 2026, at 10:00 AM, bids were received for the Union County Sheriff's Fuel Station project. A total of seven (7) bids were received from licensed contractors and were publicly opened and read aloud.

Of the seven (7) bids received, two (2) bid were deemed non-responsive. The remaining five (5) bids were evaluated for completeness and compliance with the bidding requirements.

Of the responsive bidders, Rushing Contracting Group, Inc. is the apparent low responsive, responsible bidder with a base bid of $338,682.00. A 10% contingency allowance in the amount of $33,868.20 results in a total base bid with contingency of $372,550.20. Upon review of Rushing Contracting Group, Inc.'s bid submittal, no inconsistencies were identified, and the submission appears to be complete and compliant.

The project included three (3) bid alternates, which were submitted by Rushing Contracting Group, Inc. as follows:

1. Split-Face CMU Enclosure Wall with Integral Color – $10,392.00
2. JE Adams 8685-2FG Air Machine with Gast compressor (pedestal mount) – $2,875.00
3. Two (2) Security Cameras (AXIS P4707-PLVE Dual Lens) – $5,250.00

Union County has elected to accept all three (3) bid alternates. The total contract sum, including the base bid and accepted alternates, is $357,199.00. With a contingency allowance of $33,868.20, the total contract value is $391,067.20.

Based on this information, and coordination with Union County Procurement, I recommend award of the contract to Rushing Contracting Group, Inc. in the amount of $357,199.00, with a contingency allowance of $33,868.20, for a total contract value of $391,067.20.

The supporting Bid Tabulation, bid forms, and associated documentation are attached for reference.

Respectfully submitted,
LaBella Associates

Michael McCarten, PE
Sr. Mechanical Engineer

AIA® Document A101® – 2017

Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum

AGREEMENT made as of the day of in the year 2026
(In words, indicate day, month and year.)

BETWEEN the Owner:
(Name, legal status, address and other information)

Union County, North Carolina
500 N. Main Street
Monroe, NC 28112

and the Contractor:
(Name, legal status, address and other information)
Rushing Contracting Group, Inc.
3819 Old Camden Rd
Monroe, NC 28110

for the following Project:
(Name, location and detailed description)

IFB-2026-020
Union County Sheriff's Office Fuel Station
3370 Presson Rd Monroe NC

The Architect:
(Name, legal status, address and other information)

LaBella Associates
400 South Tryon Street, Suite 1300
Charlotte, NC 28285

The Owner and Contractor agree as follows.

ADDITIONS AND DELETIONS:
The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

The parties should complete A101®–2017, Exhibit A, Insurance and Bonds, contemporaneously with this Agreement. AIA Document A201®–2017, General Conditions of the Contract for Construction, is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

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TABLE OF ARTICLES

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EXHIBIT A INSURANCE AND BONDS

ARTICLE 1 THE CONTRACT DOCUMENTS

The Contract Documents consist of this Agreement, Conditions of the Contract (General, Supplementary, and other Conditions), Drawings, Specifications, Addenda issued prior to execution of this Agreement, other documents listed in Article 9 of this Agreement, and Modifications issued after execution of this Agreement, all of which form the Contract, and are as fully a part of the Contract as if attached to this Agreement or repeated herein. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations, or agreements, either written or oral. An enumeration of the Contract Documents, other than a Modification, appears in Article 9.

ARTICLE 2 THE WORK OF THIS CONTRACT

The Contractor shall fully execute the Work described in the Contract Documents or reasonably inferable by the Contractor as necessary to produce the results intended by the Contract Documents, except as specifically indicated in the Contract Documents to be the responsibility of others. Except as expressly provided for in the Contract Documents to the contrary, the Contractor at its sole cost, risk, and expense shall construct, equip, provide, purchase, pay for, and furnish all of the Work in accordance with the Contract Documents and governmental codes and regulations as they apply to performance of the Work.

ARTICLE 3 DATE OF COMMENCEMENT AND SUBSTANTIAL COMPLETION

§ 3.1 The date of commencement of the Work shall be:
(Check one of the following boxes.)

[ ] The date of this Agreement.

[X] A date set forth in a notice to proceed issued by the Owner.

[ ] Established as follows:
(Insert a date or a means to determine the date of commencement of the Work.)

If a date of commencement of the Work is not selected, then the date of commencement shall be the date of this Agreement.

§ 3.2 The Contract Time shall be measured from the date of commencement of the Work.

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§ 3.3 Substantial Completion

§ 3.3.1 Subject to adjustments of the Contract Time as provided in the Contract Documents, the Contractor shall achieve Substantial Completion of the entire Work:
(Check one of the following boxes and complete the necessary information.)

[X] Not later than One Hundred-Fifty (150) calendar days from the date of commencement of the Work.

[ ] By the following date:

§ 3.3.2 Subject to adjustments of the Contract Time as provided in the Contract Documents, if portions of the Work are to be completed prior to Substantial Completion of the entire Work, the Contractor shall achieve Substantial Completion of such portions by the following dates:

Portion of Work	Substantial Completion Date

§ 3.3.3 If the Contractor fails to achieve Substantial Completion as provided in this Section 3.3, liquidated damages, if any, shall be assessed as set forth in Section 4.5.

ARTICLE 4 CONTRACT SUM

§ 4.1 The Owner shall pay the Contractor the Contract Sum in current funds for the Contractor's performance of the Contract. The Contract Sum shall be Three Hundred-Ninety-One-Thousand Sixty-Seven Dollars and 20/100 ($ 391,067.20), subject to additions and deductions as provided in the Contract Documents.

§ 4.2 Alternates

§ 4.2.1 Alternates, if any, included in the Contract Sum:

Item 1	Price
Alternate 1: Split-Face CMU Encloser Wall with Integral Color	$10,392.00
Item 2	**Price**
Alternate 2: JE Adams 8685-2FG Air Machine w/Gast compressor pedestal mount	$2875.00
Item 3	**Price**
Alternate 3: Two (2) Security Cameras (AXIS P4707-PLVE Dual Lens	$5250.00

§ 4.2.2 Subject to the conditions noted below, the following alternates may be accepted by the Owner following execution of this Agreement. Upon acceptance, the Owner shall issue a Modification to this Agreement.
(Insert below each alternate and the conditions that must be met for the Owner to accept the alternate.)

Item	Price	Conditions for Acceptance

§ 4.3 Allowances, if any, included in the Contract Sum:
(Identify each allowance.)

Item	Price
Owners Contingency Allowance	Thirty-Three Thousand Eight Hundred Sixty-Eight Dollars 20/100 ($33,868.20)

§ 4.4 Unit prices, if any:
(Identify the item and state the unit price and quantity limitations, if any, to which the unit price will be applicable.)

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Item-Cost to provide and install above ground Highland Fuel Tank 12,000 gallons and dispensing system as shown on the plans and specifications	**Bid Price per Unit ($181,020.00)**
Item-Cost of material and labor to construct a Three-Sided CMU Enclosure Wall with Protective Bollards as shown on the plans and specifications	**Bid Price per Unit ($54,130.00)**
Item-Cost of material and labor to provide and install all Remaining Scope of work as shown on plans and specifications	**Bid Price per Unit ($103,532.00)**

Unit prices are considered complete and include (i) all materials, equipment, labor, delivery, installation, overhead, and profit; and (ii) any other costs or expenses in connection with, or incidental to, the performance of that portion of the Work to which such unit prices apply.

§ 4.5 Liquidated damages, if any:
(Insert terms and conditions for liquidated damages, if any.)

§ 4.5.1 The Contractor acknowledges and recognizes that the Owner is entitled to full and beneficial occupancy and use of the completed Work following expiration of the Contract Time and that the Owner has relied on the Contractor's duty to achieve Substantial Completion of the Work within the Contract Time. The Contractor further acknowledges and agrees that if the Contractor fails to cause the Substantial Completion of any portion of the Work within the Contract Time, the Owner will sustain extensive damages and serious loss as a result of such failure. The exact amount of such damages will be extremely difficult to ascertain. Therefore, the Owner and the Contractor agree as set forth in this Section 4.5.

§ 4.5.2 If the Contractor fails to achieve Substantial Completion of the Work within the Contract Time, the Owner shall be entitled to retain or recover from the Contractor, as liquidated damages and not as a penalty, the amount of Two Hundred Fifty Dollars ($250.00) per day, commencing upon the first day following expiration of the Contract Time and continuing until the date that the Contractor achieves Substantial Completion of the entire Work. Such liquidated damages are hereby agreed to be a reasonable pre-estimate of damages the Owner will incur as a result of delayed completion of the Work.

§ 4.5.3 The Owner may deduct liquidated damages described in Subsection 4.5.2 from any unpaid amounts then or thereafter due the Contractor under the Contract Documents, as provided herein and otherwise in the Contract Documents. Any liquidated damages not so deducted from any unpaid amount due the Contractor shall be payable by the Contractor to the Owner together with interest from the date of the demand at the highest interest rate allowed by applicable law.

§ 4.5.4 Notwithstanding anything to the contrary in the Contract Documents, if the Owner is unable to recover any portion of liquidated damages in accordance with the terms and conditions of Section 4.5 because any portion of Section 4.5 is found to be unenforceable or invalid as a penalty or otherwise, then the Owner shall be entitled to recover from the Contractor all of the Owner's actual damages in connection with any failure by the Contractor to achieve Substantial Completion of the Work within the Contract Time, including, without limitation, consequential damages.

§ 4.6 Other:
(Insert provisions for bonus or other incentives, if any, that might result in a change to the Contract Sum.)

Notwithstanding anything herein to the contrary, the amount expended under this Contract shall not exceed the Contract Sum set forth in Section 4.1 without the execution of a Modification.

ARTICLE 5 PAYMENTS

§ 5.1 Progress Payments

§ 5.1.1 Based upon Applications for Payment submitted to the Architect by the Contractor and Certificates for Payment issued by the Architect, the Owner shall make progress payments on account of the Contract Sum to the Contractor as provided below and elsewhere in the Contract Documents.

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§ 5.1.2 The period covered by each Application for Payment shall be one calendar month ending on the last day of the month, or as follows:

§ 5.1.3 Provided that an Application for Payment is received by the Architect not later than the 5th day of a month, the Owner shall make payment of the amount certified to the Contractor not later than the 15th day of the following month. If an Application for Payment is received by the Architect after the application date fixed above, payment of the amount certified shall be made by the Owner not later than forty-five (45) days after the Architect receives the Application for Payment.
(Federal, state or local laws may require payment within a certain period of time.)

§ 5.1.4 Each Application for Payment shall be based on the most recent schedule of values submitted by the Contractor in accordance with the Contract Documents. The schedule of values shall allocate the entire Contract Sum among the various portions of the Work. The schedule of values shall be prepared in such form, and supported by such data to substantiate its accuracy, as the Architect may require. This schedule of values shall be used as a basis for reviewing the Contractor's Applications for Payment.

§ 5.1.5 Applications for Payment shall show the percentage of completion of each portion of the Work as of the end of the period covered by the Application for Payment.

§ 5.1.6 In accordance with AIA Document A201™–2017, General Conditions of the Contract for Construction, and subject to other provisions of the Contract Documents, the amount of each progress payment shall be computed as follows:

§ 5.1.6.1 The amount of each progress payment shall first include:

.1 That portion of the Contract Sum properly allocable to completed Work;

.2 That portion of the Contract Sum properly allocable to materials and equipment delivered and suitably stored at the site for subsequent incorporation in the completed construction, or, if approved in advance by the Owner, suitably stored off the site at a location agreed upon in writing; and

.3 That portion of Construction Change Directives that the Architect determines, in the Architect's professional judgment, to be reasonably justified.

§ 5.1.6.2 The amount of each progress payment shall then be reduced by:

.1 The aggregate of any amounts previously paid by the Owner;

.2 The amount, if any, for Work that remains uncorrected and for which the Architect has previously withheld a Certificate for Payment as provided in Article 9 of AIA Document A201–2017;

.3 Any amount for which the Contractor does not intend to pay a Subcontractor or material supplier, unless the Work has been performed by others the Contractor intends to pay;

.4 For Work performed or defects discovered since the last payment application, any amount for which the Architect may withhold payment, or nullify a Certificate of Payment in whole or in part, as provided in Article 9 of AIA Document A201–2017; and

.5 Retainage withheld pursuant to Section 5.1.7.

§ 5.1.7 Retainage

§ 5.1.7.1 For each progress payment made prior to Substantial Completion of the Work, the Owner may withhold retainage as set forth in Section 5.1.7:
(Insert a percentage or amount to be withheld as retainage from each Application for Payment. The amount of retainage may be limited by governing law.)

The Owner shall make progress payments on account of the Contract Price on the basis of the Contractor's Applications for Payment as recommended by the Architect monthly. Until the Work is fifty percent (50%) completed, retainage will be five percent (5%) of any progress payment due to the Contractor. The Work shall be deemed fifty percent (50%) complete when the Contractor's gross project invoices, excluding the value of materials stored off-site, equal or exceed fifty percent (50%) of the value of the Contract, except the value of materials stored on-site shall not exceed twenty percent (20%) of the Contractor's gross project invoices for the purpose of determining whether the Work is fifty percent (50%) complete.

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(Paragraphs deleted)

§ 5.1.7.2 Reduction or limitation of retainage, if any, shall be as follows:

(If the retainage established in Section 5.1.7.1 is to be modified prior to Substantial Completion of the entire Work, including modifications for Substantial Completion of portions of the Work as provided in Section 3.3.2, insert provisions for such modifications.)

When the Work is fifty percent (50%) complete, and if the Contractor continues to perform satisfactorily and any nonconforming Work identified and noticed prior to that time by the Architect or the Owner has been corrected by the Contractor and accepted by the Architect and the Owner, no further retainage shall be retained from progress payments due to the Contractor. However, following fifty percent (50%) completion of the Work, the Owner may withhold additional retainage from a subsequent progress payment, not to exceed five percent (5%) in order to allow the Owner to retain two and one-half percent (2.5%) total retainage through the completion of the Work. Subsequent to reducing retainage, the full retainage of payments authorized (up to five percent (5%) of each subsequent progress payment application) may be reinstated if the Owner determines the Contractor's performance is unsatisfactory.

§ 5.1.7.3 Except as set forth in this Section 5.1.7.3, upon Substantial Completion of the Work, the Contractor may submit an Application for Payment that includes the retainage withheld from prior Applications for Payment pursuant to this Section 5.1.7. The Application for Payment submitted at Substantial Completion shall not include retainage as follows:

(Insert any other conditions for release of retainage upon Substantial Completion.)

The Owner may retain sufficient funds to secure completion of the Work or correction of any of the Work. If the Owner retain such funds, the amount retained shall not exceed two and one-half (2 ½) times the estimated value of the Work remaining to be completed or corrected.

§ 5.1.8 If final completion of the Work is materially delayed through no fault of the Contractor, the Owner shall pay the Contractor any additional amounts in accordance with Article 9 of AIA Document A201–2017.

§ 5.1.9 Except with the Owner's prior approval, the Contractor shall not make advance payments to suppliers for materials or equipment which have not been delivered and stored at the site.

§ 5.1.10 Consent of the Surety shall be obtained before any retainage is paid by the Owner. Consent of the Surety, signed by an agent, must be accompanied by a certified copy of such agent's authority to act for the Surety.

§ 5.2 Final Payment

§ 5.2.1 Final payment, constituting the entire unpaid balance of the Contract Sum, shall be made by the Owner to the Contractor when

.1 the Contractor has fully performed the Contract except for the Contractor's responsibility to correct Work as provided in Article 12 of AIA Document A201–2017, and to satisfy other requirements, if any, which extend beyond final payment; and

.2 a final Certificate for Payment has been issued by the Architect.

§ 5.2.2 The Owner's final payment to the Contractor shall be made no later than 45 days after the issuance of the Architect's final Certificate for Payment, or as follows:

§ 5.3 Interest

Payments due and unpaid under the Contract shall bear interest from the date payment is due at the rate stated below, or in the absence thereof, at the legal rate prevailing from time to time at the place where the Project is located.

(Insert rate of interest agreed upon, if any.)

12 % per annum, or the minimum rate allowed by applicable law, if less, for such time as interest may accrue and no more.

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ARTICLE 6 DISPUTE RESOLUTION

§ 6.1 Initial Decision Maker

The Architect will serve as the Initial Decision Maker pursuant to Article 15 of AIA Document A201–2017, unless the parties appoint below another individual, not a party to this Agreement, to serve as the Initial Decision Maker.
(If the parties mutually agree, insert the name, address and other contact information of the Initial Decision Maker, if other than the Architect.)

§ 6.2 Binding Dispute Resolution

For any Claim subject to, but not resolved by, mediation pursuant to Article 15 of AIA Document A201–2017, the method of binding dispute resolution shall be as follows:
(Check the appropriate box.)

[X] Litigation in a court of competent jurisdiction

If the Owner and Contractor do not select a method of binding dispute resolution, or do not subsequently agree in writing to a binding dispute resolution method other than litigation, Claims will be resolved by litigation in a court of competent jurisdiction.

ARTICLE 7 TERMINATION OR SUSPENSION

§ 7.1 The Contract may be terminated by the Owner or the Contractor as provided in Article 14 of AIA Document A201–2017.

§ 7.1.1 If the Contract is terminated for the Owner's convenience in accordance with Article 14 of AIA Document A201–2017, then the Owner shall pay the Contractor a termination fee as follows:
(Insert the amount of, or method for determining, the fee, if any, payable to the Contractor following a termination for the Owner's convenience.)

N/A (No termination fee)

§ 7.2 The Work may be suspended by the Owner as provided in Article 14 of AIA Document A201–2017.

ARTICLE 8 MISCELLANEOUS PROVISIONS

§ 8.1 Where reference is made in this Agreement to a provision of AIA Document A201–2017 or another Contract Document, the reference refers to that provision as amended or supplemented by other provisions of the Contract Documents.

§ 8.2 The Owner's representative:
(Name, address, email address, and other information)

Chris Boyd Director
Facilities and Fleet Management
1407 Airport Road
Monroe, NC 28110

§ 8.3 The Contractor's representative:
(Name, address, email address, and other information)

Rushing Contracting Group, Inc.
3819 Old Camden Rd
Monroe, NC 28110

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(1933847402)

§ 8.4 Neither the Owner's nor the Contractor's representative shall be changed without ten days' prior notice to the other party.

§ 8.5 Insurance and Bonds

§ 8.5.1 The Owner and the Contractor shall purchase and maintain insurance as set forth in AIA Document A101™–2017, Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum, Exhibit A, Insurance and Bonds, and elsewhere in the Contract Documents.

§ 8.5.2 The Contractor shall provide bonds as set forth in AIA Document A101™–2017 Exhibit A, and elsewhere in the Contract Documents.

(Paragraphs deleted)

§ 8.7 Other provisions:

The Contractor represents and warrants the following to the Owner (in addition to any other representations and warranties contained in the Contract Documents), as an inducement to the Owner to execute this Contract, which representations and warranties shall survive the execution and delivery of this Contract, any termination of this Contract, and the final completion of the Work:

(i) that it and its Subcontractors are financially solvent, able to pay all debts as they mature, and possessed of sufficient working capital to complete the Work and perform all obligations hereunder;

(ii) that it is able to furnish the plant, tools, materials, supplies, equipment, and labor required to complete the Work and perform its obligations hereunder;

(iii) that it is authorized to do business in the State of North Carolina and properly licensed by all necessary governmental and public and quasi-public authorities having jurisdiction over it and over the Work and the Project, including, without limitation, a valid North Carolina general contractor's license;

(iv) that its execution of this Contract and its performance thereof is within its duly authorized powers;

(v) that its duly authorized representatives has visited the site of the Project, familiarized himself with the local and special conditions under which the Work is to be performed, and correlated its observations with the requirements of the Contract Documents; and

(vi) that it possesses a high level of experience and expertise in the business administration, construction, construction management, and superintendent of projects of the size, complexity, and nature of this Project, and it will perform the Work with the care, skill, and diligence of such a contractor.

The foregoing warranties are in addition to, and not in lieu of, any and all other liability imposed upon the Contractor by law with respect to the Contractor's duties, obligations, and performance hereunder. The Contractor acknowledges that the Owner is relying upon the Contractor's skill and experience in connection with the Work called for hereunder.

ARTICLE 9 ENUMERATION OF CONTRACT DOCUMENTS

§ 9.1 This Agreement is comprised of the following documents:

.1 AIA Document A101™–2017, Standard Form of Agreement Between Owner and Contractor

.2 AIA Document A101™–2017, Exhibit A, Insurance and Bonds

.3 AIA Document A201™–2017, General Conditions of the Contract for Construction

(Paragraphs deleted)

.5 Drawings

Number	Title	Date
G001	Cover Sheet	1.20.2026
M101	Fuel Station Site Plan	1.20.2026
M201	Equipment Details	1.20.2026
M202	Equipment Details	1.20.2026
E101	Electrical Plans, Notes & Schedules	1.20.2026
E201	Electrical Power Riser & Specifications	1.20.2026
A101	Enclosure Plan	1.20.2026

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S001	General Notes	1.20.2026
S101	Fountain Plan	1.20.2026

.6 Specifications

Section	Title	Pages
DIVISION 01		
01 10 00	SUMMARY	3 pg.
01 23 00	ALTERNATES	2 pg.
01 26 00	CONTRACT MODIFICATION PROCEDURES	2 pg.
01 29 00	PAYMENT PROCEDURES	3 pg.
01 31 00	PROJECT MANAGEMENT AND COORDINATION	5 pg.
01 32 00	CONSTRUCTION PROGRESS DOCUMENTATION	3 pg.
01 33 00	SUBMITTAL PROCEDURES	8 pg.
01 40 00	QUALITY REQUIREMENTS	6 pg.
01 42 00	REFERENCES	2 pg.
01 50 00	TEMPORARY FACILITIES AND CONTROLS	5 pg.
01 60 00	PRODUCT REQUIREMENTS	6 pg.
01 73 00	EXECUTION	5 pg.
01 73 29	CUTTING AND PATCHING	3 pg.
01 74 19	CONSTRUCTION WASTE MANAGEMENT AND DISPOSAL	5 pg.
01 77 00	CLOSEOUT PROCEDURES	4 pg.
01 78 23	OPERATION AND MAINTENANCE DATA	5 pg.
01 78 39	PROJECT RECORD DOCUMENTS	3 pg.
01 79 00	DEMONSTRATION AND TRAINING	2 pg.

Addenda, if any

	Date	Pages
Addendum No.1	February 19, 2026	3pg.
	Date	**Pages**
Addendum No.2	March 24,2026	5pg.

Portions of Addenda relating to bidding or proposal requirements are not part of the Contract Documents unless the bidding or proposal requirements are also enumerated in this Article 9.

.8 Other Exhibits:
(Check all boxes that apply and include appropriate information identifying the exhibit where required.)

[ ] AIA Document E204™–2017, Sustainable Projects Exhibit, dated as indicated below:
(Insert the date of the E204-2017 incorporated into this Agreement.)

[ ] The Sustainability Plan:

Title	Date	Pages

[ ] Supplementary and other Conditions of the Contract:

Document	Title	Date	Pages

.9 Other documents, if any, listed below:

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(List here any additional documents that are intended to form part of the Contract Documents. AIA Document A201™–2017 provides that the advertisement or invitation to bid, Instructions to Bidders, sample forms, the Contractor's bid or proposal, portions of Addenda relating to bidding or proposal requirements, and other information furnished by the Owner in anticipation of receiving bids or proposals, are not part of the Contract Documents unless enumerated in this Agreement. Any such documents should be listed here only if intended to be part of the Contract Documents.)

Performance Bond
Payment Bond
Notice to Proceed
Minority Participation Forms (Guidelines for Recruitment and Selection of Minority Businesses for Participation in Union County Construction Contracts, pages 1-13; Identification of HUB Certified/Minority Business Participation Form; Affidavits A-D, if required by the terms thereof; and Appendix E, MBE Documentation for Contract Payments

This Agreement entered into as of the day and year first written above.

OWNER *(Signature)*	**CONTRACTOR** *(Signature)*
Brian W Matthews, County Manager (Printed name and title)	*Matthew Seth Rushing, President/Owner (Printed name and title)*

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Additions and Deletions Report for

AIA® Document A101® – 2017

This Additions and Deletions Report, as defined on page 1 of the associated document, reproduces below all text the author has added to the standard form AIA document in order to complete it, as well as any text the author may have added to or deleted from the original AIA text. Added text is shown underlined. Deleted text is indicated with a horizontal line through the original AIA text.

Note: This Additions and Deletions Report is provided for information purposes only and is not incorporated into or constitute any part of the associated AIA document. This Additions and Deletions Report and its associated document were generated simultaneously by AIA software at 11:28:57 on 04/23/2026.

PAGE 1

AGREEMENT made as of the day of in the year 2026

...

Union County, North Carolina
500 N. Main Street
Monroe, NC 28112

...

Rushing Contracting Group, Inc.
3819 Old Camden Rd
Monroe, NC 28110

...

IFB-2026-020
Union County Sheriff's Office Fuel Station
3370 Presson Rd Monroe NC

...

LaBella Associates
400 South Tryon Street, Suite 1300
Charlotte, NC 28285

PAGE 2

The Contract Documents consist of this Agreement, Conditions of the Contract (General, Supplementary, and other Conditions), Drawings, Specifications, Addenda issued prior to execution of this Agreement, other documents listed in Article 9 of this Agreement, and Modifications issued after execution of this Agreement, all of which form the Contract, and are as fully a part of the Contract as if attached to this Agreement or repeated herein. The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations, or agreements, either written or oral. An enumeration of the Contract Documents, other than a Modification, appears in Article 9.

...

The Contractor shall fully execute the Work described in the Contract Documents or reasonably inferable by the Contractor as necessary to produce the results intended by the Contract Documents, except as specifically indicated in the Contract Documents to be the responsibility of others. Except as expressly provided for in the Contract Documents to the contrary, the Contractor at its sole cost, risk, and expense shall construct, equip, provide, purchase,

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pay for, and furnish all of the Work in accordance with the Contract Documents and governmental codes and regulations as they apply to performance of the Work.

...

[X] A date set forth in a notice to proceed issued by the Owner.

PAGE 3

[X] Not later than ~~(—)~~ One Hundred-Fifty (150) calendar days from the date of commencement of the Work.

...

§ 4.1 The Owner shall pay the Contractor the Contract Sum in current funds for the Contractor's performance of the Contract. The Contract Sum shall be ~~($—),~~ Three Hundred-Ninety-One-Thousand Sixty-Seven Dollars and 20/100 ($ 391,067.20), subject to additions and deductions as provided in the Contract Documents.

...

Item 1	**Price**
Alternate 1: Split-Face CMU Encloser Wall with Integral Color	$10,392.00
Item 2	**Price**
Alternate 2: JE Adams 8685-2FG Air Machine w/Gast compressor pedestal mount	$2875.00
Item 3	**Price**
Alternate 3: Two (2) Security Cameras (AXIS P4707-PLVE Dual Lens	$5250.00

...

Owners Contingency Allowance	Thirty-Three Thousand Eight Hundred Sixty-Eight Dollars 20/100 ($33,868.20)

PAGE 4

Item-Cost to provide and install above ground Highland Fuel Tank 12,000 gallons and dispensing system as shown on the plans and specifications		**Bid Price per Unit ($181,020.00)**
Item-Cost of material and labor to construct a Three-Sided CMU Enclosure Wall with Protective Bollards as shown on the plans and specifications		**Bid Price per Unit ($54,130.00)**
~~Item~~	~~Units and Limitations~~	~~Price per Unit ($0.00)~~
Item-Cost of material and labor to provide and install all Remaining Scope of work as shown on plans and specifications		**Bid Price per Unit ($103,532.00)**

Unit prices are considered complete and include (i) all materials, equipment, labor, delivery, installation, overhead, and profit; and (ii) any other costs or expenses in connection with, or incidental to, the performance of that portion of the Work to which such unit prices apply.

...

§ 4.5.1 The Contractor acknowledges and recognizes that the Owner is entitled to full and beneficial occupancy and use of the completed Work following expiration of the Contract Time and that the Owner has relied on the

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Contractor's duty to achieve Substantial Completion of the Work within the Contract Time. The Contractor further acknowledges and agrees that if the Contractor fails to cause the Substantial Completion of any portion of the Work within the Contract Time, the Owner will sustain extensive damages and serious loss as a result of such failure. The exact amount of such damages will be extremely difficult to ascertain. Therefore, the Owner and the Contractor agree as set forth in this Section 4.5.

§ 4.5.2 If the Contractor fails to achieve Substantial Completion of the Work within the Contract Time, the Owner shall be entitled to retain or recover from the Contractor, as liquidated damages and not as a penalty, the amount of Two Hundred Fifty Dollars ($250.00) per day, commencing upon the first day following expiration of the Contract Time and continuing until the date that the Contractor achieves Substantial Completion of the entire Work. Such liquidated damages are hereby agreed to be a reasonable pre-estimate of damages the Owner will incur as a result of delayed completion of the Work.

§ 4.5.3 The Owner may deduct liquidated damages described in Subsection 4.5.2 from any unpaid amounts then or thereafter due the Contractor under the Contract Documents, as provided herein and otherwise in the Contract Documents. Any liquidated damages not so deducted from any unpaid amount due the Contractor shall be payable by the Contractor to the Owner together with interest from the date of the demand at the highest interest rate allowed by applicable law.

§ 4.5.4 Notwithstanding anything to the contrary in the Contract Documents, if the Owner is unable to recover any portion of liquidated damages in accordance with the terms and conditions of Section 4.5 because any portion of Section 4.5 is found to be unenforceable or invalid as a penalty or otherwise, then the Owner shall be entitled to recover from the Contractor all of the Owner's actual damages in connection with any failure by the Contractor to achieve Substantial Completion of the Work within the Contract Time, including, without limitation, consequential damages.

...

Notwithstanding anything herein to the contrary, the amount expended under this Contract shall not exceed the Contract Sum set forth in Section 4.1 without the execution of a Modification.

PAGE 5

§ 5.1.3 Provided that an Application for Payment is received by the Architect not later than the 5th day of a month, the Owner shall make payment of the amount certified to the Contractor not later than the 15th day of the following month. If an Application for Payment is received by the Architect after the application date fixed above, payment of the amount certified shall be made by the Owner not later than forty-five (45) days after the Architect receives the Application for Payment.

...

§ 5.1.7.1 For each progress payment made prior to Substantial Completion of the Work, the Owner may withhold ~~the following amount, as retainage, from the payment otherwise due:~~retainage as set forth in Section 5.1.7:

...

The Owner shall make progress payments on account of the Contract Price on the basis of the Contractor's Applications for Payment as recommended by the Architect monthly. Until the Work is fifty percent (50%) completed, retainage will be five percent (5%) of any progress payment due to the Contractor. The Work shall be deemed fifty percent (50%) complete when the Contractor's gross project invoices, excluding the value of materials stored off-site, equal or exceed fifty percent (50%) of the value of the Contract, except the value of materials stored on-site shall not exceed twenty percent (20%) of the Contractor's gross project invoices for the purpose of determining whether the Work is fifty percent (50%) complete.

~~**§ 5.1.7.1.1** The following items are not subject to retainage:~~
~~*(Insert any items not subject to the withholding of retainage, such as general conditions, insurance, etc.)*~~

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PAGE 6

When the Work is fifty percent (50%) complete, and if the Contractor continues to perform satisfactorily and any nonconforming Work identified and noticed prior to that time by the Architect or the Owner has been corrected by the Contractor and accepted by the Architect and the Owner, no further retainage shall be retained from progress payments due to the Contractor. However, following fifty percent (50%) completion of the Work, the Owner may withhold additional retainage from a subsequent progress payment, not to exceed five percent (5%) in order to allow the Owner to retain two and one-half percent (2.5%) total retainage through the completion of the Work. Subsequent to reducing retainage, the full retainage of payments authorized (up to five percent (5%) of each subsequent progress payment application) may be reinstated if the Owner determines the Contractor's performance is unsatisfactory.

...

The Owner may retain sufficient funds to secure completion of the Work or correction of any of the Work. If the Owner retain such funds, the amount retained shall not exceed two and one-half (2 ½) times the estimated value of the Work remaining to be completed or corrected.

...

§ 5.1.10 Consent of the Surety shall be obtained before any retainage is paid by the Owner. Consent of the Surety, signed by an agent, must be accompanied by a certified copy of such agent's authority to act for the Surety.

...

§ 5.2.2 The Owner's final payment to the Contractor shall be made no later than ~~30~~ 45 days after the issuance of the Architect's final Certificate for Payment, or as follows:

...

12 % per annum, or the minimum rate allowed by applicable law, if less, for such time as interest may accrue and no more.

PAGE 7

~~[–] Arbitration pursuant to Section 15.4 of AIA Document A201–2017~~

[**X**] Litigation in a court of competent jurisdiction

~~[–] Other *(Specify)*~~

...

N/A (No termination fee)

...

Chris Boyd Director
Facilities and Fleet Management
1407 Airport Road
Monroe, NC 28110

...

Rushing Contracting Group, Inc.
3819 Old Camden Rd
Monroe, NC 28110

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~~**§ 8.6** Notice in electronic format, pursuant to Article 1 of AIA Document A201–2017, may be given in accordance with a building information modeling exhibit, if completed, or as otherwise set forth below:~~
~~*(If other than in accordance with a building information modeling exhibit, insert requirements for delivering notice in electronic format such as name, title, and email address of the recipient and whether and how the system will be required to generate a read receipt for the transmission.)*~~

The Contractor represents and warrants the following to the Owner (in addition to any other representations and warranties contained in the Contract Documents), as an inducement to the Owner to execute this Contract, which representations and warranties shall survive the execution and delivery of this Contract, any termination of this Contract, and the final completion of the Work:

(i) that it and its Subcontractors are financially solvent, able to pay all debts as they mature, and possessed of sufficient working capital to complete the Work and perform all obligations hereunder;

(ii) that it is able to furnish the plant, tools, materials, supplies, equipment, and labor required to complete the Work and perform its obligations hereunder;

(iii) that it is authorized to do business in the State of North Carolina and properly licensed by all necessary governmental and public and quasi-public authorities having jurisdiction over it and over the Work and the Project, including, without limitation, a valid North Carolina general contractor's license;

(iv) that its execution of this Contract and its performance thereof is within its duly authorized powers;

(v) that its duly authorized representatives has visited the site of the Project, familiarized himself with the local and special conditions under which the Work is to be performed, and correlated its observations with the requirements of the Contract Documents; and

(vi) that it possesses a high level of experience and expertise in the business administration, construction, construction management, and superintendent of projects of the size, complexity, and nature of this Project, and it will perform the Work with the care, skill, and diligence of such a contractor.

The foregoing warranties are in addition to, and not in lieu of, any and all other liability imposed upon the Contractor by law with respect to the Contractor's duties, obligations, and performance hereunder. The Contractor acknowledges that the Owner is relying upon the Contractor's skill and experience in connection with the Work called for hereunder.

...

~~.4 Building information modeling exhibit, dated as indicated below:~~
~~*(Insert the date of the building information modeling exhibit incorporated into this Agreement.)*~~

...

G001	Cover Sheet	1.20.2026
M101	Fuel Station Site Plan	1.20.2026
M201	Equipment Details	1.20.2026
M202	Equipment Details	1.20.2026
E101	Electrical Plans, Notes & Schedules	1.20.2026
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S001	General Notes	1.20.2026

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S101	Fountain Plan	1.20.2026	

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~~Section~~	~~Title~~	~~Date~~	~~Pages~~

Section	Title	Pages
DIVISION 01		
01 10 00	SUMMARY	3 pg.
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01 78 39	PROJECT RECORD DOCUMENTS	3 pg.
01 79 00	DEMONSTRATION AND TRAINING	2 pg.

~~.7~~ Addend

	Date	**Pages**
Addendum No.1	February 19, 2026	3pg.
~~Number~~	**Date**	**Pages**
Addendum No.2	March 24,2026	5pg.

PAGE 10

Performance Bond
Payment Bond
Notice to Proceed
Minority Participation Forms (Guidelines for Recruitment and Selection of Minority Businesses for Participation in Union County Construction Contracts, pages 1-13; Identification of HUB Certified/Minority Business Participation Form; Affidavits A-D, if required by the terms thereof; and Appendix E, MBE Documentation for Contract Payments

...

Brian W Matthews, County Manager (Printed name and title)	*Matthew Seth Rushing, President/Owner (Printed name and title)*

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Certification of Document's Authenticity

AIA® Document D401™ – 2003

I, , hereby certify, to the best of my knowledge, information and belief, that I created the attached final document simultaneously with its associated Additions and Deletions Report and this certification at 11:28:57 on 04/23/2026 under Order No. 20250142948 from AIA Contract Documents software and that in preparing the attached final document I made no changes to the original text of AIA® Document A101™ – 2017, Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum, other than those additions and deletions shown in the associated Additions and Deletions Report.

_____

(Signed)

_____

(Title)

_____

(Dated)

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RESOLUTION OF THE UNION COUNTY BOARD OF COMMISSIONERS PROVIDING NOTICE OF THE UNION COUNTY SHERIFF'S OFFICE FUELING STATION PROJECT CONSTRUCTION

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

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

WHEREAS, the Union County Board of Commissioners desires to give notice of construction of the UNION COUNTY SHERIFF'S OFFICE FUELING STATION PROJECT prior to commencement of project construction as required by G.S. § 153A-457.

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

1. Union County may commence construction of the UNION COUNTY SHERIFF'S OFFICE FUELING STATION PROJECT on property located at 3370 Presson Rd, Monroe, NC 28112 after the award of the construction contract for the project.

2. This resolution and notice is adopted in accordance with the construction notice requirements of G.S. § 153A-457.

Adopted this the 18th day of May, 2026.

Attest:

_____
Lynn West, Clerk to the Board

_____
Brian Helms, Chairman
Union County Board of Commissioners

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

File #: 26-269 **Agenda Date:** 5/18/2026

TITLE:

Tax Bill Correction Report for April 2026

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve Tax Bill Correction Reports for April 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:

April Refund amount = $5,399.17

Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002112	01012004	RE	2025	BATES, GERALD A JR	4/14/2026	**Value**	1,199,800	1,249,960	50,160		PUV ROLLBACK
Public Notes:						**Tax**	6,064.99	6,318.55	253.56		
						LL	0.00	0.00	0.00		
						INT	0.00	10.78	10.78		
						Tax TTL	6,064.99	6,329.33	264.34	0.00	
2025002112	01012004	RE	2024	BATES, GERALD A JR	4/14/2026	**Value**	968,700	989,060	20,360		PUV ROLLBACK
Public Notes:						**Tax**	6,265.55	6,397.24	131.69		
						LL	0.00	0.00	0.00		
						INT	0.00	17.45	17.45		
						Tax TTL	6,265.55	6,414.69	149.14	0.00	
2025002112	01012004	RE	2023	BATES, GERALD A JR	4/14/2026	**Value**	968,700	989,060	20,360		PUV ROLLBACK
Public Notes:						**Tax**	6,067.93	6,195.47	127.54		
						LL	0.00	0.00	0.00		
						INT	0.00	28.38	28.38		
						Tax TTL	6,067.93	6,223.85	155.92	0.00	
2025002150	04090016	RE	2025	NIAZI-SAI BI-BI MIRIAM REV	4/30/2026	**Value**	5,900	166,000	160,100		PUV ROLLBACK
Public Notes:						**Tax**	28.21	793.81	765.60		
						LL	0.00	0.00	0.00		
						INT	0.00	32.54	32.54		
						Tax TTL	28.21	826.35	798.14	0.00	
2025002150	04090016	RE	2024	NIAZI-SAI BI-BI MIRIAM REV	4/30/2026	**Value**	5,900	78,900	73,000		PUV ROLLBACK
Public Notes:						**Tax**	37.69	504.01	466.32		
						LL	0.00	0.00	0.00		
						INT	0.00	61.79	61.79		
						Tax TTL	37.69	565.80	528.11	0.00	
2025002150	04090016	RE	2023	NIAZI-SAI BI-BI MIRIAM REV	4/30/2026	**Value**	5,900	78,900	73,000		PUV ROLLBACK
Public Notes:						**Tax**	36.75	491.39	454.64		
						LL	0.00	0.00	0.00		
						INT	0.00	101.15	101.15		
						Tax TTL	36.75	592.54	555.79	0.00	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002118	04264009	RE	2022	BELK, CHARLES BRADLEY	4/20/2026	**Value**	373,200	411,230	38,030		PUV ROLLBACK
						Tax	2,317.20	2,553.33	236.13		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	73.79	73.79		
						Tax TTL	2,317.20	2,627.12	309.92	0.00	
2025002117	04264009B	RE	2025	BELK, DONNA M & BELK, CHARLES H	4/20/2026	**Value**	222,100	313,730	91,630		PUV ROLLBACK
						Tax	1,023.65	1,445.97	422.32		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	17.95	17.95		
						Tax TTL	1,023.65	1,463.92	440.27	0.00	
2025002117	04264009B	RE	2024	BELK, DONNA M & BELK, CHARLES H	4/20/2026	**Value**	138,000	184,990	46,990		PUV ROLLBACK
						Tax	862.64	1,156.37	293.73		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	38.91	38.91		
						Tax TTL	862.64	1,195.28	332.64	0.00	
2025002117	04264009B	RE	2023	BELK, DONNA M & BELK, CHARLES H	4/20/2026	**Value**	138,000	184,990	46,990		PUV ROLLBACK
						Tax	856.84	1,148.60	291.76		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	64.92	64.92		
						Tax TTL	856.84	1,213.52	356.68	0.00	
2025002136	08087001N	RE	2025	KUBACH, JASON	4/23/2026	**Value**	8,400	103,430	95,030		PUV ROLLBACK
						Tax	42.90	528.22	485.32		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	20.63	20.63		
						Tax TTL	42.90	548.85	505.95	0.00	
2025002136	08087001N	RE	2024	KUBACH, JASON	4/23/2026	**Value**	8,300	63,260	54,960		PUV ROLLBACK
						Tax	55.49	422.90	367.41		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	48.68	48.68		
						Tax TTL	55.49	471.58	416.09	0.00	

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Union County

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Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002136	08087001N	RE	2023	KUBACH, JASON	4/23/2026	**Value**	8,300	63,260	54,960		PUV ROLLBACK
						Tax	54.63	416.43	361.80		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	80.50	80.50		
						Tax TTL	54.63	496.93	442.30	0.00	
2025002077	08126015	RE	2025	GRIFFIN, NANCY P & NIVEN, KATHLEEN P	4/6/2026	**Value**	744,700	778,160	33,460		PUV ROLLBACK
						Tax	3,784.57	3,954.61	170.04		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	7.23	7.23		
						Tax TTL	3,784.57	3,961.84	177.27	0.00	
2025002077	08126015	RE	2024	GRIFFIN, NANCY P & NIVEN, KATHLEEN P	4/6/2026	**Value**	236,900	246,590	9,690		PUV ROLLBACK
						Tax	1,600.74	1,666.22	65.48		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	8.68	8.68		
						Tax TTL	1,600.74	1,674.90	74.16	0.00	
2025002077	08126015	RE	2023	GRIFFIN, NANCY P & NIVEN, KATHLEEN P	4/6/2026	**Value**	236,900	246,590	9,690		PUV ROLLBACK
						Tax	1,585.81	1,650.67	64.86		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	14.43	14.43		
						Tax TTL	1,585.81	1,665.10	79.29	0.00	
2025002153	08228021	RE	2025	LUCAS, PAUL DOUGLAS JR TRU & LUCAS, VICKIE LYNN TRUS	4/30/2026	**Value**	687,000	921,600	234,600		PUV ROLLBACK
						Tax	3,508.51	4,706.61	1,198.10		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	50.92	50.92		
						Tax TTL	3,508.51	4,757.53	1,249.02	0.00	
2025002153	08228021	RE	2024	LUCAS, PAUL DOUGLAS JR TRU & LUCAS, VICKIE LYNN TRUS	4/30/2026	**Value**	491,600	586,200	94,600		PUV ROLLBACK
						Tax	3,286.35	3,918.75	632.40		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	83.80	83.80		
						Tax TTL	3,286.35	4,002.55	716.20	0.00	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : PUV Rollback

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002153	08228021	RE	2023	LUCAS, PAUL DOUGLAS JR TRU & LUCAS, VICKIE LYNN TRUS	4/30/2026	**Value**	491,600	586,200	94,600		PUV ROLLBACK
						Tax	3,236.20	3,858.95	622.75		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	138.57	138.57		
						Tax TTL	3,236.20	3,997.52	761.32	0.00	
2025002111	09012003	RE	2023	HAMILTON, SARAH K & HAMILTON, JAMES DANIEL	4/14/2026	**Value**	273,300	436,320	163,020		PUV ROLLBACK
						Tax	1,790.12	2,857.90	1,067.78		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	237.59	237.59		
						Tax TTL	1,790.12	3,095.49	1,305.37	0.00	
2025002110	09012003C	RE	2025	BARBEE, LUANNE	4/14/2026	**Value**	13,600	337,400	323,800		PUV ROLLBACK
						Tax	68.83	1,707.58	1,638.75		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	69.65	69.65		
						Tax TTL	68.83	1,777.23	1,708.40	0.00	
2025002110	09012003C	RE	2024	BARBEE, LUANNE	4/14/2026	**Value**	13,500	178,100	164,600		PUV ROLLBACK
						Tax	90.92	1,199.50	1,108.58		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	146.89	146.89		
						Tax TTL	90.92	1,346.39	1,255.47	0.00	
				Totals for Type PUV Rollback :		**Value**	**7,240,300**	**9,193,930**	**1,953,630**		
						Tax	**42,666.52**	**53,893.08**	**11,226.56**		
						LL	**0.00**	**0.00**	**0.00**		
						INT	**0.00**	**1,355.23**	**1,355.23**		
						Tax TTL	**42,666.52**	**55,248.31**	**12,581.79**	**0.00**	

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Union County

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Correction Type : Value Change - Discovery

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002079	05115074	RE	2025	EL ROPHE CENTER INC	4/7/2026	**Value**	0	125,600	125,600		EXEMPTION STATUS CHANGE
Public Notes:						**Tax**	0.00	967.37	967.37		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	967.37	967.37	0.00	
2025002152	06114070	RE	2025	WRIGHT, MICHAEL JAMES	4/30/2026	**Value**	62,000	111,300	49,300		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						**Tax**	308.57	553.94	245.37		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	308.57	553.94	245.37	0.00	
2025002081	07018014A	RE	2025	J BLAIRE THOMPSON LLC	4/7/2026	**Value**	764,900	1,081,500	316,600		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						**Tax**	3,647.81	5,157.67	1,509.86		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,647.81	5,157.67	1,509.86	0.00	
2025002081	07018014A	RE	2024	J BLAIRE THOMPSON LLC	4/7/2026	**Value**	545,100	804,400	259,300		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						**Tax**	3,484.28	5,141.72	1,657.44		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,484.28	5,141.72	1,657.44	0.00	
2025002081	07018014A	RE	2023	J BLAIRE THOMPSON LLC	4/7/2026	**Value**	545,100	804,400	259,300		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						**Tax**	3,445.58	5,084.61	1,639.03		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,445.58	5,084.61	1,639.03	0.00	
2025002081	07018014A	RE	2022	J BLAIRE THOMPSON LLC	4/7/2026	**Value**	545,100	594,700	49,600		CHANGE TO IMPROVEMENT OR LISTING
Public Notes:						**Tax**	3,445.58	3,759.10	313.52		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,445.58	3,759.10	313.52	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002081	07018014A	RE	2021	J BLAIRE THOMPSON LLC	4/7/2026	**Value**	545,100	594,700	49,600		CHANGE TO IMPROVEMENT OR LISTING
						Tax	3,445.58	3,759.10	313.52		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,445.58	3,759.10	313.52	0.00	
2025002080	07072007A	RE	2025	SHERWIN-HANFIELD LLC	4/7/2026	**Value**	644,900	943,600	298,700		CHANGE TO IMPROVEMENT OR LISTING
						Tax	4,216.36	6,169.26	1,952.90		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,216.36	6,169.26	1,952.90	0.00	
2025002151	09040012E	RE	2025	TRULL, ALAN W TRUSTEE	4/30/2026	**Value**	90,400	190,100	99,700		CHANGE TO IMPROVEMENT OR LISTING
						Tax	457.51	962.10	504.59		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	457.51	962.10	504.59	0.00	
2025002145	407823	PP	2025	BRANTLEY, STEVEN MARK	4/29/2026	**Value**	212,658	326,121	113,463		TMA AUDIT DISCOVERY
						Tax	960.15	1,472.44	512.29		
Public Notes:						**LL**	0.00	20.69	20.69		
						INT	0.00	0.00	0.00		
						Tax TTL	960.15	1,493.13	532.98	0.00	
2025002145	407823	PP	2024	BRANTLEY, STEVEN MARK	4/29/2026	**Value**	217,121	332,892	115,771		TMA AUDIT DISCOVERY
						Tax	1,326.39	2,033.64	707.25		
Public Notes:						**LL**	0.00	46.22	46.22		
						INT	0.00	0.00	0.00		
						Tax TTL	1,326.39	2,079.86	753.47	0.00	
2025002145	407823	PP	2023	BRANTLEY, STEVEN MARK	4/29/2026	**Value**	241,747	370,691	128,944		TMA AUDIT DISCOVERY
						Tax	1,469.82	2,253.80	783.98		
Public Notes:						**LL**	0.00	66.94	66.94		
						INT	0.00	0.00	0.00		
						Tax TTL	1,469.82	2,320.74	850.92	0.00	

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2025002145	407823	PP	2022	BRANTLEY, STEVEN MARK	4/29/2026	**Value**	313,421	480,895	167,474		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,905.60	2,923.84	1,018.24		
						LL	0.00	90.69	90.69		
						INT	0.00	0.00	0.00		
						Tax TTL	1,905.60	3,014.53	1,108.93	0.00	
2025002145	407823	PP	2021	BRANTLEY, STEVEN MARK	4/29/2026	**Value**	358,211	549,725	191,514		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,183.30	3,350.57	1,167.27		
						LL	0.00	117.54	117.54		
						INT	0.00	0.00	0.00		
						Tax TTL	2,183.30	3,468.11	1,284.81	0.00	
2025002125	411219	PP	2025	JDJ LOGISTICS LLC	4/21/2026	**Value**	46,623	69,653	23,030		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	312.09	466.26	154.17		
						LL	31.21	46.63	15.42		
						INT	0.00	0.00	0.00		
						Tax TTL	343.30	512.89	169.59	0.00	
2025002125	411219	PP	2023	JDJ LOGISTICS LLC	4/21/2026	**Value**	57,704	82,943	25,239		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	474.21	681.63	207.42		
						LL	0.00	62.23	62.23		
						INT	0.00	0.00	0.00		
						Tax TTL	474.21	743.86	269.65	0.00	
2025002125	411219	PP	2022	JDJ LOGISTICS LLC	4/21/2026	**Value**	58,379	84,282	25,903		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	479.76	692.63	212.87		
						LL	0.00	85.15	85.15		
						INT	0.00	0.00	0.00		
						Tax TTL	479.76	777.78	298.02	0.00	
2025002125	411219	PP	2021	JDJ LOGISTICS LLC	4/21/2026	**Value**	3,079	19,119	16,040		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	25.28	157.01	131.73		
						LL	0.00	65.86	65.86		
						INT	0.00	0.00	0.00		
						Tax TTL	25.28	222.87	197.59	0.00	

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2025002125	411219	PP	2020	JDJ LOGISTICS LLC	4/21/2026	**Value**	61,416	63,216	1,800		TMA AUDIT DISCOVERY
						Tax	614.59	632.60	18.01		
Public Notes:						**LL**	0.00	10.81	10.81		
						INT	0.00	0.00	0.00		
						Tax TTL	614.59	643.41	28.82	0.00	
2025002121	411434	PP	2025	KELBY CONSTRUCTION INC	4/21/2026	**Value**	49,040	59,815	10,775		TMA AUDIT DISCOVERY
						Tax	245.79	299.79	54.00		
Public Notes:						**LL**	24.58	35.39	10.81		
						INT	0.00	0.00	0.00		
						Tax TTL	270.37	335.18	64.81	0.00	
2025002121	411434	PP	2024	KELBY CONSTRUCTION INC	4/21/2026	**Value**	53,561	69,755	16,194		TMA AUDIT DISCOVERY
						Tax	354.36	461.50	107.14		
Public Notes:						**LL**	35.44	67.58	32.14		
						INT	0.00	0.00	0.00		
						Tax TTL	389.80	529.08	139.28	0.00	
2025002121	411434	PP	2023	KELBY CONSTRUCTION INC	4/21/2026	**Value**	52,463	78,353	25,890		TMA AUDIT DISCOVERY
						Tax	343.69	513.29	169.60		
Public Notes:						**LL**	34.37	102.20	67.83		
						INT	0.00	0.00	0.00		
						Tax TTL	378.06	615.49	237.43	0.00	
2025002121	411434	PP	2022	KELBY CONSTRUCTION INC	4/21/2026	**Value**	59,781	97,048	37,267		TMA AUDIT DISCOVERY
						Tax	391.63	635.76	244.13		
Public Notes:						**LL**	0.00	122.07	122.07		
						INT	0.00	0.00	0.00		
						Tax TTL	391.63	757.83	366.20	0.00	
2025002130	411716	PP	2021	LAWRENCE ASSOCIATES PA	4/22/2026	**Value**	124,486	182,453	57,967		TMA AUDIT DISCOVERY
						Tax	1,600.27	2,345.43	745.16		
Public Notes:						**LL**	0.00	447.10	447.10		
						INT	0.00	0.00	0.00		
						Tax TTL	1,600.27	2,792.53	1,192.26	0.00	

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Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002135	413616	PP	2025	PURE GREEN INC	4/23/2026	**Value**	825,419	867,340	41,921		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,936.42	4,136.34	199.92		
						LL	0.00	39.98	39.98		
						INT	0.00	0.00	0.00		
						Tax TTL	3,936.42	4,176.32	239.90	0.00	
2025002135	413616	PP	2024	PURE GREEN INC	4/23/2026	**Value**	913,703	960,565	46,862		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	5,840.39	6,139.93	299.54		
						LL	0.00	89.86	89.86		
						INT	0.00	0.00	0.00		
						Tax TTL	5,840.39	6,229.79	389.40	0.00	
2025002135	413616	PP	2023	PURE GREEN INC	4/23/2026	**Value**	513,557	571,910	58,353		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,246.19	3,615.04	368.85		
						LL	0.00	147.54	147.54		
						INT	0.00	0.00	0.00		
						Tax TTL	3,246.19	3,762.58	516.39	0.00	
2025002135	413616	PP	2022	PURE GREEN INC	4/23/2026	**Value**	566,777	575,227	8,450		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	3,582.60	3,636.01	53.41		
						LL	0.00	26.71	26.71		
						INT	0.00	0.00	0.00		
						Tax TTL	3,582.60	3,662.72	80.12	0.00	
2025002128	413855	PP	2024	RELIANCE MANAGEMENT GROUP	4/22/2026	**Value**	2,080,402	2,117,917	37,515		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	17,408.80	17,722.73	313.93		
						LL	0.00	94.18	94.18		
						INT	0.00	0.00	0.00		
						Tax TTL	17,408.80	17,816.91	408.11	0.00	
2025002128	413855	PP	2023	RELIANCE MANAGEMENT GROUP	4/22/2026	**Value**	970,880	2,124,140	1,153,260		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	8,011.70	17,528.40	9,516.70		
						LL	801.17	4,607.85	3,806.68		
						INT	0.00	0.00	0.00		
						Tax TTL	8,812.87	22,136.25	13,323.38	0.00	

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2025002128	413855	PP	2021	RELIANCE MANAGEMENT GROUP	4/22/2026	**Value**	799,442	834,185	34,743		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	6,447.50	6,727.70	280.20		
						LL	644.75	812.88	168.13		
						INT	0.00	0.00	0.00		
						Tax TTL	7,092.25	7,540.58	448.33	0.00	
2025002091	414356	PP	2025	SHEPARD, DONALD LEE	4/8/2026	**Value**	497,656	524,647	26,991		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,482.31	2,616.94	134.63		
						LL	248.23	275.16	26.93		
						INT	0.00	0.00	0.00		
						Tax TTL	2,730.54	2,892.10	161.56	0.00	
2025002091	414356	PP	2023	SHEPARD, DONALD LEE	4/8/2026	**Value**	420,095	506,099	86,004		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,759.60	3,324.56	564.96		
						LL	0.00	225.98	225.98		
						INT	0.00	0.00	0.00		
						Tax TTL	2,759.60	3,550.54	790.94	0.00	
2025002091	414356	PP	2021	SHEPARD, DONALD LEE	4/8/2026	**Value**	268,459	443,420	174,961		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,766.46	2,917.70	1,151.24		
						LL	0.00	690.74	690.74		
						INT	0.00	0.00	0.00		
						Tax TTL	1,766.46	3,608.44	1,841.98	0.00	
2025002100	414428	PP	2025	SIMPSON, DON SCOTT	4/9/2026	**Value**	189,462	276,292	86,830		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	945.04	1,378.14	433.10		
						LL	0.00	86.62	86.62		
						INT	0.00	0.00	0.00		
						Tax TTL	945.04	1,464.76	519.72	0.00	
2025002100	414428	PP	2024	SIMPSON, DON SCOTT	4/9/2026	**Value**	192,670	291,263	98,593		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,287.04	1,945.64	658.60		
						LL	0.00	197.58	197.58		
						INT	0.00	0.00	0.00		
						Tax TTL	1,287.04	2,143.22	856.18	0.00	

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2025002100	414428	PP	2023	SIMPSON, DON SCOTT	4/9/2026	**Value**	194,857	302,775	107,918		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,280.02	1,988.93	708.91		
						LL	0.00	283.56	283.56		
						INT	0.00	0.00	0.00		
						Tax TTL	1,280.02	2,272.49	992.47	0.00	
2025002100	414428	PP	2022	SIMPSON, DON SCOTT	4/9/2026	**Value**	195,451	307,611	112,160		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,283.92	2,020.70	736.78		
						LL	0.00	368.39	368.39		
						INT	0.00	0.00	0.00		
						Tax TTL	1,283.92	2,389.09	1,105.17	0.00	
2025002100	414428	PP	2021	SIMPSON, DON SCOTT	4/9/2026	**Value**	181,883	291,239	109,356		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,196.79	1,916.35	719.56		
						LL	0.00	431.74	431.74		
						INT	0.00	0.00	0.00		
						Tax TTL	1,196.79	2,348.09	1,151.30	0.00	
2025002116	415089	PP	2025	TERRY CAUTHEN TRUCKING INC	4/17/2026	**Value**	181,000	184,101	3,101		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	865.54	880.37	14.83		
						LL	0.00	2.97	2.97		
						INT	0.00	0.00	0.00		
						Tax TTL	865.54	883.34	17.80	0.00	
2025002116	415089	PP	2024	TERRY CAUTHEN TRUCKING INC	4/17/2026	**Value**	182,515	186,445	3,930		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,165.91	1,191.01	25.10		
						LL	0.00	7.53	7.53		
						INT	0.00	0.00	0.00		
						Tax TTL	1,165.91	1,198.54	32.63	0.00	
2025002116	415089	PP	2023	TERRY CAUTHEN TRUCKING INC	4/17/2026	**Value**	148,175	152,912	4,737		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	922.83	952.34	29.51		
						LL	0.00	11.80	11.80		
						INT	0.00	0.00	0.00		
						Tax TTL	922.83	964.14	41.31	0.00	

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2025002116	415089	PP	2022	TERRY CAUTHEN TRUCKING INC	4/17/2026	**Value**	154,548	159,754	5,206		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	962.52	994.95	32.43		
						LL	0.00	16.21	16.21		
						INT	0.00	0.00	0.00		
						Tax TTL	962.52	1,011.16	48.64	0.00	
2025002116	415089	PP	2021	TERRY CAUTHEN TRUCKING INC	4/17/2026	**Value**	147,857	153,149	5,292		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	936.67	970.20	33.53		
						LL	0.00	20.11	20.11		
						INT	0.00	0.00	0.00		
						Tax TTL	936.67	990.31	53.64	0.00	
2025002127	577975	PP	2025	LAKE PARK ANIMAL CLINIC PL	4/22/2026	**Value**	202,081	208,248	6,167		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,287.05	1,326.33	39.28		
						LL	0.00	7.86	7.86		
						INT	0.00	0.00	0.00		
						Tax TTL	1,287.05	1,334.19	47.14	0.00	
2025002127	577975	PP	2024	LAKE PARK ANIMAL CLINIC PL	4/22/2026	**Value**	244,168	250,335	6,167		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,079.58	2,132.10	52.52		
						LL	0.00	15.76	15.76		
						INT	0.00	0.00	0.00		
						Tax TTL	2,079.58	2,147.86	68.28	0.00	
2025002127	577975	PP	2023	LAKE PARK ANIMAL CLINIC PL	4/22/2026	**Value**	282,945	289,087	6,142		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,361.46	2,412.72	51.26		
						LL	236.15	256.65	20.50		
						INT	0.00	0.00	0.00		
						Tax TTL	2,597.61	2,669.37	71.76	0.00	
2025002127	577975	PP	2022	LAKE PARK ANIMAL CLINIC PL	4/22/2026	**Value**	312,754	318,648	5,894		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,610.24	2,659.44	49.20		
						LL	261.02	285.62	24.60		
						INT	0.00	0.00	0.00		
						Tax TTL	2,871.26	2,945.06	73.80	0.00	

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2025002127	577975	PP	2021	LAKE PARK ANIMAL CLINIC PL	4/22/2026	**Value**	324,504	330,771	6,267		TMA AUDIT DISCOVERY
						Tax	2,667.75	2,719.27	51.52		
Public Notes:						**LL**	0.00	30.91	30.91		
						INT	0.00	0.00	0.00		
						Tax TTL	2,667.75	2,750.18	82.43	0.00	
2025002096	578798	PP	2025	NASH COMPANY INC & NASH, SUE C	4/9/2026	**Value**	307,217	430,340	123,123		TMA AUDIT DISCOVERY
						Tax	1,469.11	2,057.89	588.78		
Public Notes:						**LL**	0.00	117.76	117.76		
						INT	0.00	0.00	0.00		
						Tax TTL	1,469.11	2,175.65	706.54	0.00	
2025002096	578798	PP	2024	NASH COMPANY INC & NASH, SUE C	4/9/2026	**Value**	352,260	491,354	139,094		TMA AUDIT DISCOVERY
						Tax	2,250.24	3,138.77	888.53		
Public Notes:						**LL**	0.00	266.56	266.56		
						INT	0.00	0.00	0.00		
						Tax TTL	2,250.24	3,405.33	1,155.09	0.00	
2025002096	578798	PP	2023	NASH COMPANY INC & NASH, SUE C	4/9/2026	**Value**	371,288	511,999	140,711		TMA AUDIT DISCOVERY
						Tax	2,312.38	3,188.73	876.35		
Public Notes:						**LL**	0.00	350.54	350.54		
						INT	0.00	0.00	0.00		
						Tax TTL	2,312.38	3,539.27	1,226.89	0.00	
2025002096	578798	PP	2022	NASH COMPANY INC & NASH, SUE C	4/9/2026	**Value**	359,796	460,246	100,450		TMA AUDIT DISCOVERY
						Tax	2,240.81	2,866.41	625.60		
Public Notes:						**LL**	0.00	312.80	312.80		
						INT	0.00	0.00	0.00		
						Tax TTL	2,240.81	3,179.21	938.40	0.00	
2025002096	578798	PP	2021	NASH COMPANY INC & NASH, SUE C	4/9/2026	**Value**	326,783	390,367	63,584		TMA AUDIT DISCOVERY
						Tax	2,070.17	2,472.97	402.80		
Public Notes:						**LL**	0.00	241.68	241.68		
						INT	0.00	0.00	0.00		
						Tax TTL	2,070.17	2,714.65	644.48	0.00	

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2025002131	578968	PP	2025	SOFTBALL FITNESS AND PERFO	4/22/2026	**Value**	35,049	38,165	3,116		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	234.62	255.48	20.86		
						LL	23.46	27.63	4.17		
						INT	0.00	0.00	0.00		
						Tax TTL	258.08	283.11	25.03	0.00	
2025002131	578968	PP	2024	SOFTBALL FITNESS AND PERFO	4/22/2026	**Value**	45,395	48,151	2,756		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	389.26	412.89	23.63		
						LL	38.93	46.02	7.09		
						INT	0.00	0.00	0.00		
						Tax TTL	428.19	458.91	30.72	0.00	
2025002076	581433	PP	2025	TREE LIFE OF THE CAROLINAS	4/2/2026	**Value**	367,410	397,436	30,026		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,835.58	1,985.59	150.01		
						LL	183.56	213.56	30.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,019.14	2,199.15	180.01	0.00	
2025002076	581433	PP	2024	TREE LIFE OF THE CAROLINAS	4/2/2026	**Value**	348,252	374,154	25,902		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,273.39	2,442.48	169.09		
						LL	0.00	50.73	50.73		
						INT	0.00	0.00	0.00		
						Tax TTL	2,273.39	2,493.21	219.82	0.00	
2025002076	581433	PP	2023	TREE LIFE OF THE CAROLINAS	4/2/2026	**Value**	298,676	316,930	18,254		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,890.62	2,006.17	115.55		
						LL	189.06	235.30	46.24		
						INT	0.00	0.00	0.00		
						Tax TTL	2,079.68	2,241.47	161.79	0.00	
2025002076	581433	PP	2022	TREE LIFE OF THE CAROLINAS	4/2/2026	**Value**	316,604	334,878	18,274		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,013.60	2,129.82	116.22		
						LL	0.00	58.11	58.11		
						INT	0.00	0.00	0.00		
						Tax TTL	2,013.60	2,187.93	174.33	0.00	

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2025002076	581433	PP	2021	TREE LIFE OF THE CAROLINAS	4/2/2026	**Value**	280,604	301,833	21,229		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,784.64	1,919.66	135.02		
						LL	0.00	81.01	81.01		
						INT	0.00	0.00	0.00		
						Tax TTL	1,784.64	2,000.67	216.03	0.00	
2025002071	590066	PP	2025	BASINGER, JACOB	4/1/2026	**Value**	359,851	883,947	524,096		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,728.00	4,244.71	2,516.71		
						LL	172.80	424.46	251.66		
						INT	0.00	0.00	0.00		
						Tax TTL	1,900.80	4,669.17	2,768.37	0.00	
2025002071	590066	PP	2024	BASINGER, JACOB	4/1/2026	**Value**	404,703	928,799	524,096		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,591.31	5,947.10	3,355.79		
						LL	259.13	930.30	671.17		
						INT	0.00	0.00	0.00		
						Tax TTL	2,850.44	6,877.40	4,026.96	0.00	
2025002071	590066	PP	2023	BASINGER, JACOB	4/1/2026	**Value**	270,234	495,909	225,675		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,702.20	3,123.73	1,421.53		
						LL	170.22	596.70	426.48		
						INT	0.00	0.00	0.00		
						Tax TTL	1,872.42	3,720.43	1,848.01	0.00	
2025002071	590066	PP	2022	BASINGER, JACOB	4/1/2026	**Value**	284,614	351,849	67,235		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,792.78	2,216.30	423.52		
						LL	179.28	348.68	169.40		
						INT	0.00	0.00	0.00		
						Tax TTL	1,972.06	2,564.98	592.92	0.00	
2025002071	590066	PP	2021	BASINGER, JACOB	4/1/2026	**Value**	128,467	194,154	65,687		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	807.16	1,219.87	412.71		
						LL	80.72	287.10	206.38		
						INT	0.00	0.00	0.00		
						Tax TTL	887.88	1,506.97	619.09	0.00	

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2025002071	590066	PP	2020	BASINGER, JACOB	4/1/2026	**Value**	189,283	238,765	49,482		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,483.03	1,870.72	387.69		
						LL	148.30	380.91	232.61		
						INT	0.00	0.00	0.00		
						Tax TTL	1,631.33	2,251.63	620.30	0.00	
2025002074	606306	PP	2025	WAXHAW TAPROOM LLC	4/2/2026	**Value**	554,296	588,113	33,817		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	4,269.19	4,529.65	260.46		
						LL	426.92	479.01	52.09		
						INT	0.00	0.00	0.00		
						Tax TTL	4,696.11	5,008.66	312.55	0.00	
2025002074	606306	PP	2024	WAXHAW TAPROOM LLC	4/2/2026	**Value**	596,219	663,190	66,971		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	6,113.03	6,799.69	686.66		
						LL	611.30	817.30	206.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,724.33	7,616.99	892.66	0.00	
2025002074	606306	PP	2023	WAXHAW TAPROOM LLC	4/2/2026	**Value**	637,735	660,968	23,233		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	6,472.37	6,708.16	235.79		
						LL	647.24	741.55	94.31		
						INT	0.00	0.00	0.00		
						Tax TTL	7,119.61	7,449.71	330.10	0.00	
2025002074	606306	PP	2022	WAXHAW TAPROOM LLC	4/2/2026	**Value**	673,957	691,400	17,443		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	6,839.99	7,017.02	177.03		
						LL	684.00	772.53	88.53		
						INT	0.00	0.00	0.00		
						Tax TTL	7,523.99	7,789.55	265.56	0.00	
2025002074	606306	PP	2021	WAXHAW TAPROOM LLC	4/2/2026	**Value**	621,197	637,222	16,025		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	6,294.59	6,456.97	162.38		
						LL	629.46	726.89	97.43		
						INT	0.00	0.00	0.00		
						Tax TTL	6,924.05	7,183.86	259.81	0.00	

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2025002113	614263	PP	2025	KHC ENVIRONMENTAL LLC	4/15/2026	**Value**	418,620	423,908	5,288		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	2,010.21	2,035.61	25.40		
						LL	0.00	5.08	5.08		
						INT	0.00	0.00	0.00		
						Tax TTL	2,010.21	2,040.69	30.48	0.00	
2025002113	614263	PP	2024	KHC ENVIRONMENTAL LLC	4/15/2026	**Value**	223,726	233,200	9,474		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	1,432.52	1,493.18	60.66		
						LL	143.25	161.45	18.20		
						INT	0.00	0.00	0.00		
						Tax TTL	1,575.77	1,654.63	78.86	0.00	
2025002113	614263	PP	2023	KHC ENVIRONMENTAL LLC	4/15/2026	**Value**	116,865	128,731	11,866		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	736.13	810.88	74.75		
						LL	0.00	29.90	29.90		
						INT	0.00	0.00	0.00		
						Tax TTL	736.13	840.78	104.65	0.00	
2025002113	614263	PP	2022	KHC ENVIRONMENTAL LLC	4/15/2026	**Value**	88,172	93,752	5,580		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	555.40	590.54	35.14		
						LL	0.00	17.58	17.58		
						INT	0.00	0.00	0.00		
						Tax TTL	555.40	608.12	52.72	0.00	
2025002113	614263	PP	2021	KHC ENVIRONMENTAL LLC	4/15/2026	**Value**	34,470	38,650	4,180		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	216.58	242.84	26.26		
						LL	21.66	37.42	15.76		
						INT	0.00	0.00	0.00		
						Tax TTL	238.24	280.26	42.02	0.00	
2025002073	615709	PP	2025	ERWINS TREE SERVICE & STUM	4/2/2026	**Value**	51,464	189,221	137,757		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	260.15	956.51	696.36		
						LL	26.02	165.29	139.27		
						INT	0.00	0.00	0.00		
						Tax TTL	286.17	1,121.80	835.63	0.00	

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2025002073	615709	PP	2024	ERWINS TREE SERVICE & STUM	4/2/2026	**Value**	63,387	172,404	109,017		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	409.99	1,115.11	705.12		
						LL	41.00	252.54	211.54		
						INT	0.00	0.00	0.00		
						Tax TTL	450.99	1,367.65	916.66	0.00	
2025002073	615709	PP	2023	ERWINS TREE SERVICE & STUM	4/2/2026	**Value**	64,225	178,209	113,984		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	402.31	1,116.30	713.99		
						LL	40.23	325.84	285.61		
						INT	0.00	0.00	0.00		
						Tax TTL	442.54	1,442.14	999.60	0.00	
2025002073	615709	PP	2022	ERWINS TREE SERVICE & STUM	4/2/2026	**Value**	69,460	138,286	68,826		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	435.10	866.22	431.12		
						LL	43.51	259.08	215.57		
						INT	0.00	0.00	0.00		
						Tax TTL	478.61	1,125.30	646.69	0.00	
2025002073	615709	PP	2021	ERWINS TREE SERVICE & STUM	4/2/2026	**Value**	69,861	126,715	56,854		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	438.45	795.26	356.81		
						LL	43.85	257.94	214.09		
						INT	0.00	0.00	0.00		
						Tax TTL	482.30	1,053.20	570.90	0.00	
2025002141	625578	PP	2025	FOWLER, DENNIS T C	4/27/2026	**Value**	1,715	7,581	5,866		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	8.56	37.84	29.28		
						LL	0.00	2.93	2.93		
						INT	0.00	0.00	0.00		
						Tax TTL	8.56	40.77	32.21	0.00	
2025002107	657845	PP	2024	PROFOUND HEALTH PLLC	4/10/2026	**Value**	0	73,855	73,855		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	757.24	757.24		
						LL	0.00	151.45	151.45		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	908.69	908.69	0.00	

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2025002107	657845	PP	2023	PROFOUND HEALTH PLLC	4/10/2026	**Value**	0	73,855	73,855		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	749.55	749.55		
						LL	0.00	224.87	224.87		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	974.42	974.42	0.00	
2025002107	657845	PP	2022	PROFOUND HEALTH PLLC	4/10/2026	**Value**	0	73,855	73,855		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	749.55	749.55		
						LL	0.00	299.82	299.82		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,049.37	1,049.37	0.00	
2025002107	657845	PP	2021	PROFOUND HEALTH PLLC	4/10/2026	**Value**	0	73,855	73,855		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	748.37	748.37		
						LL	0.00	374.19	374.19		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,122.56	1,122.56	0.00	
2025002101	657854	PP	2024	J&H WAXHAW LLC	4/9/2026	**Value**	0	300,000	300,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	3,075.90	3,075.90		
						LL	0.00	615.18	615.18		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	3,691.08	3,691.08	0.00	
2025002101	657854	PP	2023	J&H WAXHAW LLC	4/9/2026	**Value**	0	300,000	300,000		TMA AUDIT DISCOVERY
Public Notes:						**Tax**	0.00	3,044.70	3,044.70		
						LL	0.00	913.41	913.41		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	3,958.11	3,958.11	0.00	
2025002109	657866	PP	2024	QUALITY IRISH GROUP LLC	4/13/2026	**Value**	0	90,165	90,165		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	924.46	924.46		
						LL	0.00	184.89	184.89		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,109.35	1,109.35	0.00	

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2025002109	657866	PP	2023	QUALITY IRISH GROUP LLC	4/13/2026	**Value**	0	90,165	90,165		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	915.08	915.08		
						LL	0.00	274.52	274.52		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,189.60	1,189.60	0.00	
2025002109	657866	PP	2022	QUALITY IRISH GROUP LLC	4/13/2026	**Value**	0	90,165	90,165		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	915.08	915.08		
						LL	0.00	366.03	366.03		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,281.11	1,281.11	0.00	
2025002109	657866	PP	2021	QUALITY IRISH GROUP LLC	4/13/2026	**Value**	0	90,165	90,165		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	913.64	913.64		
						LL	0.00	456.82	456.82		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,370.46	1,370.46	0.00	
2025002109	657866	PP	2020	QUALITY IRISH GROUP LLC	4/13/2026	**Value**	0	90,165	90,165		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	1,053.58	1,053.58		
						LL	0.00	632.15	632.15		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,685.73	1,685.73	0.00	
2025002138	657867	PP	2024	THE INDIGO PEARL LLC	4/27/2026	**Value**	0	0	0		BUSINESS CANVASSING DISCOVERY
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	
2025002138	657867	PP	2023	THE INDIGO PEARL LLC	4/27/2026	**Value**	0	10,000	10,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	101.49	101.49		
						LL	0.00	30.45	30.45		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	131.94	131.94	0.00	

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2025002138	657867	PP	2022	THE INDIGO PEARL LLC	4/27/2026	**Value**	0	10,000	10,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	101.49	101.49		
						LL	0.00	40.60	40.60		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	142.09	142.09	0.00	
2025002138	657867	PP	2021	THE INDIGO PEARL LLC	4/27/2026	**Value**	0	10,000	10,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	101.33	101.33		
						LL	0.00	50.67	50.67		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	152.00	152.00	0.00	
2025002138	657867	PP	2020	THE INDIGO PEARL LLC	4/27/2026	**Value**	0	10,000	10,000		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	116.85	116.85		
						LL	0.00	70.11	70.11		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	186.96	186.96	0.00	
2025002103	657889	PP	2024	FINESSE NAILS	4/10/2026	**Value**	0	54,760	54,760		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	561.45	561.45		
						LL	0.00	112.29	112.29		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	673.74	673.74	0.00	
2025002103	657889	PP	2023	FINESSE NAILS	4/10/2026	**Value**	0	54,760	54,760		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	555.76	555.76		
						LL	0.00	166.73	166.73		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	722.49	722.49	0.00	
2025002103	657889	PP	2022	FINESSE NAILS	4/10/2026	**Value**	0	54,760	54,760		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	555.76	555.76		
						LL	0.00	222.30	222.30		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	778.06	778.06	0.00	

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2025002103	657889	PP	2021	FINESSE NAILS	4/10/2026	**Value**	0	54,760	54,760		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	554.88	554.88		
						LL	0.00	277.44	277.44		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	832.32	832.32	0.00	
2025002103	657889	PP	2020	FINESSE NAILS	4/10/2026	**Value**	0	54,760	54,760		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	639.87	639.87		
						LL	0.00	383.92	383.92		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,023.79	1,023.79	0.00	
2025002108	657904	PP	2024	SPIRITED SPROUT LLC	4/13/2026	**Value**	0	61,015	61,015		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	625.59	625.59		
						LL	0.00	125.12	125.12		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	750.71	750.71	0.00	
2025002108	657904	PP	2023	SPIRITED SPROUT LLC	4/13/2026	**Value**	0	61,015	61,015		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	619.24	619.24		
						LL	0.00	185.77	185.77		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	805.01	805.01	0.00	
2025002108	657904	PP	2022	SPIRITED SPROUT LLC	4/13/2026	**Value**	0	61,015	61,015		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	619.24	619.24		
						LL	0.00	247.70	247.70		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	866.94	866.94	0.00	
2025002108	657904	PP	2021	SPIRITED SPROUT LLC	4/13/2026	**Value**	0	61,015	61,015		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	618.26	618.26		
						LL	0.00	309.13	309.13		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	927.39	927.39	0.00	

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2025002108	657904	PP	2020	SPIRITED SPROUT LLC	4/13/2026	**Value**	0	61,015	61,015		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	712.96	712.96		
						LL	0.00	427.78	427.78		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,140.74	1,140.74	0.00	
2025002120	657925	PP	2024	EYE LEVEL OF WAXHAW LEARNI	4/21/2026	**Value**	0	7,500	7,500		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	76.90	76.90		
						LL	0.00	15.38	15.38		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	92.28	92.28	0.00	
2025002120	657925	PP	2023	EYE LEVEL OF WAXHAW LEARNI	4/21/2026	**Value**	0	7,500	7,500		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	76.12	76.12		
						LL	0.00	22.84	22.84		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	98.96	98.96	0.00	
2025002120	657925	PP	2022	EYE LEVEL OF WAXHAW LEARNI	4/21/2026	**Value**	0	7,500	7,500		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	76.12	76.12		
						LL	0.00	30.45	30.45		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	106.57	106.57	0.00	
2025002120	657925	PP	2021	EYE LEVEL OF WAXHAW LEARNI	4/21/2026	**Value**	0	7,500	7,500		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	76.00	76.00		
						LL	0.00	38.00	38.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	114.00	114.00	0.00	
2025002120	657925	PP	2020	EYE LEVEL OF WAXHAW LEARNI	4/21/2026	**Value**	0	7,500	7,500		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	87.64	87.64		
						LL	0.00	52.58	52.58		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	140.22	140.22	0.00	

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2025002102	658228	PP	2024	GAIL'S GARDEN & BAKERY LLC	4/10/2026	**Value**	0	75,120	75,120		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	498.95	498.95		
						LL	0.00	99.79	99.79		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	598.74	598.74	0.00	
2025002075	669582	PP	2025	SAN JUAN INC	4/2/2026	**Value**	0	72,770	72,770		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	636.16	636.16		
						LL	0.00	63.62	63.62		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	699.78	699.78	0.00	
2025002075	669582	PP	2024	SAN JUAN INC	4/2/2026	**Value**	0	72,770	72,770		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	793.56	793.56		
						LL	0.00	158.71	158.71		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	952.27	952.27	0.00	
2025002075	669582	PP	2023	SAN JUAN INC	4/2/2026	**Value**	0	72,770	72,770		BUSINESS CANVASSING DISCOVERY
Public Notes:						**Tax**	0.00	793.56	793.56		
						LL	0.00	238.07	238.07		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	1,031.63	1,031.63	0.00	
2025002148	669627	PP	2025	MTY INK LLC	4/29/2026	**Value**	0	13,300	13,300		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	87.54	87.54		
						LL	0.00	8.75	8.75		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	96.29	96.29	0.00	
2025002144	674291	PP	2025	PARKER, J B	4/28/2026	**Value**	0	2,170	2,170		GAP BILL
Public Notes:						**Tax**	0.00	21.08	21.08		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	21.08	21.08	0.00	

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2025002146	675044	PP	2025	GRIFFIN, JOHN CALVIN JR	4/29/2026	**Value**	0	4,735	4,735		GAP BILL
Public Notes:						**Tax**	0.00	23.96	23.96		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	23.96	23.96	0.00	
2025002137	675045	PP	2025	INGRAM, PHILANDER	4/27/2026	**Value**	0	3,953	3,953		GAP BILL
Public Notes:						**Tax**	0.00	19.75	19.75		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	19.75	19.75	0.00	
2025002142	675112	PP	2025	SANCHEZ, JOSE LUIS	4/27/2026	**Value**	0	54,145	54,145		UNLISTED REAL OR PERSONAL PROPERTY
Public Notes:						**Tax**	0.00	260.00	260.00		
						LL	0.00	52.00	52.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	312.00	312.00	0.00	
2025002087	676059	PP	2025	F DONALD LAWRENCE AND ASSO	4/8/2026	**Value**	0	8,088	8,088		GAP BILL
Public Notes:						**Tax**	0.00	83.65	83.65		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	83.65	83.65	0.00	
2025002088	676060	PP	2025	THE LAW OFFICE OF JAMES J	4/8/2026	**Value**	0	50,320	50,320		GAP BILL
Public Notes:						**Tax**	0.00	520.41	520.41		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	520.41	520.41	0.00	

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2025002086	676061	PP	2025	SAENZ CALDERON, LIZETH YAN	4/8/2026	Value	0	3,585	3,585		GAP BILL
						Tax	0.00	37.08	37.08		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	0.00	37.08	37.08	0.00	
				Totals for Type Value Change - Discovery :		**Value**	**25,975,405**	**35,942,513**	**9,967,108**		
						Tax	**180,236.00**	**253,899.77**	**73,663.77**		
						LL	**7,120.82**	**28,367.00**	**21,246.18**		
						INT	**0.00**	**0.00**	**0.00**		
						Tax TTL	**187,356.82**	**282,266.77**	**94,909.95**	**0.00**	

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002139	04279014C	RE	2025	UNION COUNTY BOARD OF EDUC	4/27/2026	Value	167,100	0	(167,100)		EXEMPTION STATUS CHANGE
						Tax	804.75	0.00	(804.75)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	804.75	0.00	(804.75)	0.00	
2025002139	04279014C	RE	2024	UNION COUNTY BOARD OF EDUC	4/27/2026	Value	57,000	0	(57,000)		EXEMPTION STATUS CHANGE
						Tax	366.62	0.00	(366.62)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	366.62	0.00	(366.62)	366.62	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002139	04279014C	RE	2023	UNION COUNTY BOARD OF EDUC	4/27/2026	**Value**	57,000	0	(57,000)		EXEMPTION STATUS CHANGE
Public Notes:						**Tax**	361.61	0.00	(361.61)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	361.61	0.00	(361.61)	371.55	
2025002139	04279014C	RE	2022	UNION COUNTY BOARD OF EDUC	4/27/2026	**Value**	57,000	0	(57,000)		EXEMPTION STATUS CHANGE
Public Notes:						**Tax**	361.61	0.00	(361.61)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	361.61	0.00	(361.61)	371.55	
2025002139	04279014C	RE	2021	UNION COUNTY BOARD OF EDUC	4/27/2026	**Value**	57,000	0	(57,000)		EXEMPTION STATUS CHANGE
Public Notes:						**Tax**	359.21	0.00	(359.21)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	359.21	0.00	(359.21)	366.39	
2025002139	04279014C	RE	2020	UNION COUNTY BOARD OF EDUC	4/27/2026	**Value**	30,100	0	(30,100)		EXEMPTION STATUS CHANGE
Public Notes:						**Tax**	232.13	0.00	(232.13)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	232.13	0.00	(232.13)	232.13	
2025002095	05063101	RE	2025	CIABATTONI, SANDRA ELIZABE & CIABATTONI, JOHN NICHOL	4/8/2026	**Value**	1,097,100	957,000	(140,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						**Tax**	5,268.27	4,595.51	(672.76)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,268.27	4,595.51	(672.76)	672.76	
2025002094	06075058	RE	2025	HICKEY, BRIAN	4/8/2026	**Value**	1,125,900	1,075,800	(50,100)		CHANGE VALUE DUE TO AN APPEAL
Public Notes:						**Tax**	5,484.26	5,240.22	(244.04)		
						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5,484.26	5,240.22	(244.04)	244.04	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002099	06147255	RE	2025	ZHANG, YU & XIAN, HUI	4/9/2026	**Value**	1,324,200	1,235,600	(88,600)		CHANGE VALUE DUE TO AN APPEAL
						Tax	6,615.70	6,173.06	(442.64)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	6,615.70	6,173.06	(442.64)	411.63	
2025002093	06153289	RE	2025	BRECKEN, LEONARD & BRECKEN, SUZAN	4/8/2026	**Value**	2,945,900	2,750,000	(195,900)		CHANGE VALUE DUE TO AN APPEAL
						Tax	14,717.72	13,739.00	(978.72)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	14,717.72	13,739.00	(978.72)	910.15	
2025002090	06228125	RE	2025	NGAI, TATYANA & NGAI, HING	4/8/2026	**Value**	1,580,300	1,445,000	(135,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	7,342.07	6,713.47	(628.60)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	7,342.07	6,713.47	(628.60)	628.60	
2025002098	07058498	RE	2025	VADINI, ANTHONY & VADINI, GAIL C	4/9/2026	**Value**	739,800	694,500	(45,300)		CHANGE VALUE DUE TO AN APPEAL
						Tax	4,785.77	4,492.72	(293.05)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	4,785.77	4,492.72	(293.05)	216.04	
2025002092	07090677	RE	2025	BATES, LISA M & BATES, CLARENCE C	4/8/2026	**Value**	508,200	500,000	(8,200)		CHANGE VALUE DUE TO AN APPEAL
						Tax	3,322.61	3,269.00	(53.61)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	3,322.61	3,269.00	(53.61)	39.67	
2025002097	07096164	RE	2025	MUCHLER, CODY & MUCHLER, NICOLE	4/9/2026	**Value**	596,800	550,000	(46,800)		CHANGE VALUE DUE TO AN APPEAL
						Tax	2,907.01	2,679.05	(227.96)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	2,907.01	2,679.05	(227.96)	227.96	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002089	411486	PP	2025	KIKER, KENNETH	4/8/2026	**Value**	54,466	0	(54,466)		BUSINESS CLOSED
Public Notes:						**Tax**	276.80	0.00	(276.80)		
						LL	27.68	0.00	(27.68)		
						INT	0.00	0.00	0.00		
						Tax TTL	304.48	0.00	(304.48)	0.00	
2025002140	578396	PP	2025	CRANE, JEFFREY WAREEN	4/27/2026	**Value**	14,997	0	(14,997)		SOLD PP ASSET
Public Notes:						**Tax**	71.81	0.00	(71.81)		
						LL	7.18	0.00	(7.18)		
						INT	0.00	0.00	0.00		
						Tax TTL	78.99	0.00	(78.99)	0.00	
2025002072	590066	PP	2023	BASINGER, JACOB	4/1/2026	**Value**	495,909	493,309	(2,600)		SOLD PP ASSET
Public Notes:						**Tax**	3,123.73	3,107.35	(16.38)		
						LL	596.70	595.06	(1.64)		
						INT	0.00	0.00	0.00		
						Tax TTL	3,720.43	3,702.41	(18.02)	18.02	
2025002072	590066	PP	2022	BASINGER, JACOB	4/1/2026	**Value**	351,849	349,112	(2,737)		SOLD PP ASSET
Public Notes:						**Tax**	2,216.30	2,199.06	(17.24)		
						LL	348.68	346.96	(1.72)		
						INT	0.00	0.00	0.00		
						Tax TTL	2,564.98	2,546.02	(18.96)	18.96	
2025002119	606060	PP	2025	IVEY, KEITH LINELL	4/20/2026	**Value**	21,075	20,218	(857)		SOLD PP ASSET
Public Notes:						**Tax**	97.13	93.18	(3.95)		
						LL	9.71	9.33	(0.38)		
						INT	0.00	0.00	0.00		
						Tax TTL	106.84	102.51	(4.33)	0.38	
2025002143	640864	PP	2025	RICHARDSON, BARRY DEVON	4/28/2026	**Value**	45,016	0	(45,016)		DUPLICATE ASSESSMENT
Public Notes:						**Tax**	224.90	0.00	(224.90)		
						LL	22.49	0.00	(22.49)		
						INT	0.00	0.00	0.00		
						Tax TTL	247.39	0.00	(247.39)	0.00	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002070	644706	PP	2025	GOVERO, JENNIFER LEE & SAWYER, SCOTT NICHOLAS	4/1/2026	**Value**	52,197	31,457	(20,740)		SOLD PP ASSET
						Tax	240.58	144.99	(95.59)		
Public Notes:						**LL**	24.06	14.50	(9.56)		
						INT	0.00	0.00	0.00		
						Tax TTL	264.64	159.49	(105.15)	105.15	
2025002126	658103	PP	2025	SANCHEZ, BANESSA COLIN	4/21/2026	**Value**	13,246	0	(13,246)		SOLD PP ASSET
						Tax	100.15	0.00	(100.15)		
Public Notes:						**LL**	10.02	0.00	(10.02)		
						INT	0.00	0.00	0.00		
						Tax TTL	110.17	0.00	(110.17)	0.00	
2025002078	666675	PP	2024	KURUP, GAYATHRI PRATAP	4/7/2026	**Value**	64,937	0	(64,937)		TAXPAYER MOVED
						Tax	665.80	0.00	(665.80)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	665.80	0.00	(665.80)	0.00	
2025002084	666774	PP	2024	KURUP, PRATAP SASIDHARA	4/7/2026	**Value**	11,854	0	(11,854)		TAXPAYER MOVED
						Tax	121.54	0.00	(121.54)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	121.54	0.00	(121.54)	0.00	
2025002083	667505	PP	2024	WARD, MICHAEL PATRICK	4/7/2026	**Value**	66,697	0	(66,697)		TAXPAYER MOVED
						Tax	429.73	0.00	(429.73)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	429.73	0.00	(429.73)	0.00	
2025002082	667964	PP	2024	WARD, MICHAEL PATRICK	4/7/2026	**Value**	23,007	6,428	(16,579)		TAXPAYER MOVED
						Tax	148.23	41.42	(106.81)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	148.23	41.42	(106.81)	2.82	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002133	667991	PP	2024	VASQUEZ, GILBERTO JUNIOR & VASQUEZ, CHRISTEN ELIZA	4/22/2026	**Value**	13,983	0	(13,983)		TAXPAYER MOVED
						Tax	117.01	0.00	(117.01)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	117.01	0.00	(117.01)	0.00	
2025002115	667991	PP	2024	VASQUEZ, GILBERTO JUNIOR & VASQUEZ, CHRISTEN ELIZA	4/17/2026	**Value**	25,170	13,983	(11,187)		TAXPAYER MOVED
						Tax	210.62	117.01	(93.61)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	210.62	117.01	(93.61)	0.00	
2025002085	668584	PP	2024	DONNELLY, RYAN PATRICK	4/7/2026	**Value**	37,913	6,893	(31,020)		TAXPAYER MOVED
						Tax	238.02	43.27	(194.75)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	238.02	43.27	(194.75)	194.75	
2025002069	670750	PP	2025	STAMPER, CASEY JOSEPH & STAMPER, ALEXIA FAITH	4/1/2026	**Value**	48,277	0	(48,277)		TAXPAYER MOVED
						Tax	313.99	0.00	(313.99)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	313.99	0.00	(313.99)	0.00	
2025002068	670755	PP	2025	STAMPER, CASEY JOSEPH	4/1/2026	**Value**	8,430	0	(8,430)		TAXPAYER MOVED
						Tax	54.83	0.00	(54.83)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	54.83	0.00	(54.83)	0.00	
2025002123	673180	PP	2025	KNIGHT, JEREMY DWAYNE	4/21/2026	**Value**	6,090	0	(6,090)		TAXPAYER MOVED
						Tax	30.78	0.00	(30.78)		
Public Notes:						**LL**	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	30.78	0.00	(30.78)	0.00	

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Correction Listing Report

Union County

Date Posted between 4/1/2026 and 4/30/2026

Correction Type : Value Change - Release

Correction	Property Key	Source	Year	Name	Date Posted		Original	Corrected	Corrected Diff	Refund Amount	Correction Reason
2025002134	673247	PP	2025	VASQUEZ, GILBERTO JUNIOR & VASQUEZ, CHRISTEN ELIZA	4/22/2026	Value	8,203	4,101	(4,102)		TAXPAYER MOVED
						Tax	39.69	19.84	(19.85)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	39.69	19.84	(19.85)	0.00	
2025002114	673247	PP	2025	VASQUEZ, GILBERTO JUNIOR & VASQUEZ, CHRISTEN ELIZA	4/17/2026	Value	32,813	8,203	(24,610)		TAXPAYER MOVED
						Tax	158.75	39.69	(119.06)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	158.75	39.69	(119.06)	0.00	
2025002122	673289	PP	2025	KNIGHT, JEREMY DWAYNE & KNIGHT, TIFFANI MICHELL	4/21/2026	Value	1,110	0	(1,110)		TAXPAYER MOVED
						Tax	5.61	0.00	(5.61)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	5.61	0.00	(5.61)	0.00	
2025002149	675765	PP	2025	PARKER, JAMES ANTHONY & PARKER, KIMBERLY MILLER	4/30/2026	Value	2,068	0	(2,068)		CLERICAL ERROR
						Tax	13.17	0.00	(13.17)		
Public Notes:						LL	0.00	0.00	0.00		
						INT	0.00	0.00	0.00		
						Tax TTL	13.17	0.00	(13.17)	0.00	
				Totals for Type Value Change - Release :		**Value**	**11,742,707**	**10,141,604**	**(1,601,103)**		
						Tax	**61,828.51**	**52,707.84**	**(9,120.67)**		
						LL	**1,046.52**	**965.85**	**(80.67)**		
						INT	**0.00**	**0.00**	**0.00**		
						Tax TTL	**62,875.03**	**53,673.69**	**(9,201.34)**	**5,399.17**	

Grand Totals :

Year	Refund Amount
	5,399.17

Value	**44,958,412**	**55,278,047**	**10,319,635**	
Tax	**284,731.03**	**360,500.69**	**75,769.66**	
LL	**8,167.34**	**29,332.85**	**21,165.51**	
INT	**0.00**	**1,355.23**	**1,355.23**	
Tax TTL	**292,898.37**	**391,188.77**	**98,290.40**	**5,399.17**

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File #: 26-276 **Agenda Date:** 5/18/2026

TITLE:

Interlocal Agreement - Stallings District S

INFORMATION CONTACT:

Vann Harrell, Tax Administration, Tax Administrator, 704-283-3748

ACTION REQUESTED:

Authorize the County Manager to 1) negotiate and execute an agreement substantially consistent with the agenda item, 2) exercise any renewal or extension term options set forth in the Agreement, 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 Tax Administration serves as the tax collector for the Town of Stallings pursuant to an interlocal agreement executed in 2015 and amended in 2022. District S located within the Town of Stalling was authorized by SL 2023-144 for the purpose of levying and collecting occupancy tax from lodging establishments located within the district. The District S governing board has requested Union County Tax Administration to function as the tax collector for occupancy taxes.

FINANCIAL IMPACT:

Union County will receive 1.25% of revenue collected pursuant to the agreement.

STATE OF NORTH CAROLINA

COUNTY OF UNION

INTERLOCAL OCCUPANCY TAX BILLING AND COLLECTION AGREEMENT

THIS AGREEMENT is made as of _____, by and between **Stallings District S**, a taxing district and body politic and corporate organized under the laws of the State of North Carolina (the "District"), and **UNION COUNTY**, a political subdivision of the State of North Carolina (the "County").

W I T N E S S E T H:

WHEREAS, the District and the County have the power pursuant to General Statute §153A-445(a)(1), S.L. 2023-144, and Article 20 of Chapter 160A of the North Carolina General Statutes to jointly exercise any function which they have been granted the power to exercise alone, or to contract with the other for the exercise of any governmental function which they have been granted the power to exercise alone, and to enter into contracts or agreements to specify the details of these joint undertakings; and

WHEREAS, the District is authorized pursuant to S.L. 2023-144 and General Statute §160A-215 to levy an occupancy tax of a certain percentage of the gross receipts derived from the rental of an accommodation within the District that is subject to sales tax imposed by the State under General Statute §105-164.4, upon meeting certain conditions set forth in S.L. 2023-144; and

WHEREAS, the District represents it has met the conditions required under S.L. 2023-144 to levy such an occupancy tax; and

WHEREAS, such an occupancy tax levied by the District shall be administered, collected, and repealed as provided in General Statute §160A-215, as if the District were a city; and

WHEREAS, the District desires for the County, by and through its duly appointed Tax Administrator, to administer and collect the occupancy tax levied by the District, as well as any associated penalties, pursuant to S.L. 2023-144; and

WHEREAS, the District, by action of the District's governing body dated _____, requested the County to administer and collect current and subsequent delinquent occupancy taxes and any associated penalties; and

WHEREAS, the County, by action of the Union County Board of County Commissioners, dated _____, has agreed to administer and collect current and subsequent delinquent occupancy taxes and any associated penalties;

NOW, THEREFORE, for and in consideration of the premises and the mutual covenants of the parties as set forth herein, the District and Union County agree that the Agreement is stated in its entirety as follows:

1. **ADMINISTRATION AND COLLECTION OF THE DISTRICT'S OCCUPANCY TAXES:** The County shall administer and collect occupancy taxes levied by the District, as well as any associated penalties, beginning with the fiscal year which commences on July 1, 2026. Unless otherwise agreed upon, the County will not be responsible for the

collection of any delinquent taxes, penalties, interest, or previously assessed fees by the District for any years prior to the commencement date of this Agreement. The District agrees to fully cooperate with the County in the administration and collection process, including cooperating with the County in designing and furnishing to all appropriate businesses and persons within the District the necessary forms for filing returns and instructions to ensure the full collection of the occupancy taxes (as set forth in General Statute §160A-215(c)), as well as identifying properties subject to the collection of occupancy taxes.

2. **ADMINISTRATION AND COLLECTION OF OTHER NEW TAXES, FEES, OR ASSESSMENTS:** This Agreement acknowledges that, to the extent the District has, or obtains the authority in the future, to levy any taxes, fees, or assessments other than the aforementioned occupancy tax, the District, in accordance with this Agreement, shall not levy any new tax, fee, or assessment with the expectation that the County will administer and collect the same. Any such taxes, fees, or assessments levied in accordance with State law would be subject to a separate addendum to this Agreement with a separately negotiated administration and collection fee schedule.

3. **COUNTY AUTHORITY:** The County shall have all of the authority as set forth in S.L. 2023-144, General Statute §160A-215, and all other applicable law in the process of administering and collecting the occupancy tax levied by the District, as well as any associated penalties.

4. **ALLOCATION OF RECEIPTS:** At the end of each calendar month, the County will analyze the month's deposit of funds collected to determine the dollar amount of occupancy taxes which are allocable to the District. On or before the tenth (10^{th}) day of the next month, the County will remit to the District, via electronic funds transfer (EFT), the District's share of the occupancy taxes, as well as any associated penalties, collected for the previous month. Any discrepancies that are found after the remittance date will be adjusted in the next remittance date for the District.

5. **MONTHLY COLLECTION REPORTS:** A collection report detailing all occupancy taxes, and any associated penalties, collected will be provided to the District on or before the fifteenth (15^{th}) day of each month for the period ending with the last calendar day of the previous month (see attached Exhibit A as to the form of the monthly collection report).

6. **FEES TO BE PAID BY THE DISTRICT TO THE COUNTY:** The District will compensate the County for the services provided in this Agreement on a percentage rate equal to one and one-quarter percent (1.25%) of the total amount of occupancy taxes, and any associated penalties, collected by the County on behalf of the District in accordance with this Agreement.

7. **ANNEXATIONS:** In the event property is annexed into the District, the District shall be responsible for notifying the County at a reasonable time prior to any annexation in order to allow the County sufficient time to determine whether any occupancy taxes need to be collected as a result of the annexation.

8. **TERMINATION:** The District or the County shall have the right to terminate this Agreement effective July 1 of each year, beginning with July 1, 2027. The decision to

terminate shall be made by the respective governing bodies of the District and the County. Notice to terminate must be given in writing no later than March 1 of any year.

9. MISCELLANEOUS:

(a) All decisions involving collection methods, including, without limitation, attachment, garnishment, and levy, and other collection proceedings are delegated to the County, including the determination of applicability of any claimed deduction made under General Statute § 160A-215(c). The County agrees to use its best efforts in accurately collecting the District's occupancy taxes. The District's governing body retains the right to waive penalties for occupancy tazes as set forth in under General Statute § 160A-215(e). Upon the waiver of any such penalties, the District shall promptly notify the County of such waiver.

(b) The Tax Administrator of the County is, by this Agreement, designated as a representative of the Finance Officer of the District to whom those owing occupancy taxes levied by the District should pay such occupancy tax and return any prescribed form in accordance with General Statute § 160A-215(d). All duties of the District's Finance Officer for administration and collection of the District's occupancy taxes under General Statute §160A-215, are transferred to the County Tax Administrator.

(c) A room occupancy tax return filed with the County is not a public record and may not be disclosed except in accordance with General Statutes §§ 153A-148.1 or 160A-208.1.

(d) This Agreement may be amended in writing at any time by mutual agreement of the parties.

This Agreement is executed in duplicate originals as of the day and year first above stated by authority duly granted by the Stallings District S governing body and the Union County Board of Commissioners.

Attest:

Stallings District S

_____ By: _____

TITLE TITLE

[SEAL]

Attest:

Union County

_____ By: _____

Clerk to the Board of Commissioners County Manager

[SEAL]

This instrument has been pre-audited in the manner required by the local government Budget and Fiscal Control Act

_____

Director of Finance, Stallings District S

Approved as to form: ___

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

File #: 26-241 **Agenda Date:** 5/18/2026

TITLE:

Minutes for Approval

INFORMATION CONTACT:

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

ACTION REQUESTED:

Approve minutes

PRIOR BOARD ACTIONS:

None

BACKGROUND:

The draft minutes have been emailed to the Commissioners for review.

FINANCIAL IMPACT:

None

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

File #: 26-265 **Agenda Date:** 5/18/2026

TITLE:

Union County Public Schools Annual Financial Comprehensive Report Fiscal Year 2025

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Public Schools has completed their ACFR for FY 2025 and has provided a copy based on Section XXIII of the Annual Adopted Budget Ordinance.

FINANCIAL IMPACT:

None.

UNION COUNTY PUBLIC SCHOOLS

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ANNUAL COMPREHENSIVE

Financial REPORT

2025

Fiscal year ending June 30, 2025

Union County Board of Education
UNION COUNTY PUBLIC SCHOOLS
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Monroe, North Carolina

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Union County Board of Education
Monroe, North Carolina
Annual Comprehensive Financial Report
For the Year Ended June 30, 2025

Board Members

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Matt Helms, Vice-Chair

Todd Price	Joseph Morreale
Rev. John L. Kirkpatrick, IV	Sarah May
Kathy Heintel	Sandra Greene
Barry Tucker	

Principal Officers

Andrew G. Houlihan, Ed.D.	Superintendent
W. Colon Moore	Asst. Superintendent of Administration & Operations
Tahira Stalberte	Asst. Superintendent of Communications & Community Relations
Jay Jones	Asst. Superintendent of Student Support
Susan Rodgers, Ed.D.	Asst. Superintendent of Academics
Jonathan Tyson, Ed.D.	Asst. Superintendent of School Performance
James Parker	Chief Technology Officer
Shanna McLamb	Chief Finance Officer
Michele Morris, JD	General Counsel

Prepared by Shanna McLamb
And the Finance Department

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Introductory Section

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400 North Church Street
Monroe, NC 28112
704.296.9898
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Letter of Transmittal

December 31, 2025

To the members of the Union County Board of Education and the citizens of Union County, North Carolina.

In compliance with the Public School Laws of North Carolina, The Annual Comprehensive Financial Report (ACFR) of the Union County Board of Education, operating as the "Union County Public Schools", for the fiscal year ended June 30, 2025, is herewith submitted. Responsibility for the accuracy, completeness, and clarity of the report rests with the Superintendent and the Chief Finance Officer.

The accompanying financial report has been prepared in accordance with generally accepted accounting principles. We believe the data presented is accurate in all material respects and is presented in a manner designed to reflect fairly the financial position and results of operations of the Board. All disclosures necessary to enable the reader to gain maximum understanding of the Board's financial activity have been included.

The report consists of three sections: Introductory, Financial and Statistical. The Introductory Section, of which the transmittal letter is a part, includes a list of Board members, principal officials and the organizational chart. The Financial Section includes the independent auditors' report, notes to the financial statements, the combining and individual fund statements and schedules arranged by fund type. It also includes the Management's Discussion and Analysis (MD&A) of the Board's financial performance which is a narrative introduction overview and analysis to accompany the basic financial statements. The Statistical Section includes several tables of unaudited data providing financial history of the Board, as well as demographics and other informative reports.

The Government Finance Officers Association of the United States and Canada (GFOA) awarded a Certificate of Achievement for Excellence in Financial Reporting to the Union County Board of Education for its Annual Comprehensive Financial Report for the fiscal year ended June 30, 2024. To be awarded a Certificate of Achievement, a government must publish an easily readable and efficiently organized Annual Comprehensive Financial Report. This report must satisfy both generally accepted accounting principles and applicable legal requirements.

A Certificate of Achievement is valid for a period of one year only. We believe that our current Annual Comprehensive Financial Report continues to meet the Certificate of Achievement for Excellence in Financial Reporting program requirements, and we are submitting it to the GFOA to determine its eligibility for a certificate for fiscal year ended June 30, 2025.

In compliance with federal law, UCPS administers all educational programs, employment activities and admissions without discrimination against any person on the basis of gender, race, color, religion, national origin, age or disability.

This letter of transmittal is designed to complement Management's Discussion and Analysis (MD&A) and should be read in conjunction with it. The MD&A can be found immediately following the report of the independent auditors.

REPORTING ENTITY

The Union County Board of Education, elected by the citizens of Union County, is the level of government having oversight responsibility and control over activities related to public school education in Union County, North Carolina. N. C. General Statutes empower the Union County Board of Education with general control and supervision of all matters pertaining to the schools in the system. The Board has no tax levying or borrowing authority and is required to maintain accounting records in a Uniform State format. The Board consists of nine members elected for staggered terms of four years. The Chair and Vice Chair are elected by a majority vote of the Board each year. The Superintendent serves as secretary to the Board.

For the 2024-2025 school year, the school system served students from pre-kindergarten to 12th grade in 1 pre-kindergarten school, 30 elementary schools, 9 middle schools, 10 high schools, 1 alternative school and 1 early college. Additionally, local funds totaling more than $13 million were paid to 29 area charter schools serving 4785 county resident students and $510,320 paid to 4 virtual schools serving 225 county resident students. The school system receives local, state and federal government funding and must comply with the legal requirements of each funding source entity. While the Board does receive county funding, the County is not entitled to share in any surplus nor is it required to finance any deficits.

ECONOMIC CONDITIONS AND FUTURE OUTLOOK

As of January 2026, the estimated population for Union County, NC is approximately 275,138 with a growth rate of 2.18%. The 2015 population was close to 220,000 and has seen a growth of 20% since that time. Union County is the 8th largest county in North Carolina. In the past 30 years, Union County has added over 150,000 residents and is projected to add nearly the same amount in the next 30 years. This rise in new residents can be contributed to many workers who previously endured long commutes to downtown Charlotte are now able to work from home, which makes Union County's quiet neighborhoods, excellent schools, and lower taxes an even bigger draw for growth. For fiscal year 2025, 4228 residential construction permits were issued county-wide compared to fiscal year 2024 of 4037 showing an increase in the residential number of permits. This trend is anticipated to continue into 2026.

Due to the County's rapid growth during the previous decade and forecast of continued growth for the next 30 years, maintenance of existing infrastructure and facilities will be an even greater challenge. State law provides for and funds the operating costs of a sound, basic education program which is supplemented by the county and federal governments. The building of public-school facilities has been a joint state and county effort. Local financial support is provided by the county for capital and operating expenses.

Union County voters continue to support bond referendums to address aging facilities and replace current buildings. Currently, there are two active Bond projects, one at East Elementary and Forest Hills High School. Since 2000, school bonds have resulted in nearly 30 new school construction and renovation projects.

In compliance with federal law, UCPS administers all educational programs, employment activities and admissions without discrimination against any person on the basis of gender, race, color, religion, national origin, age or disability.

Union County Public Schools is the sixth largest public-school system in North Carolina. UCPS serves approximately 40,000 students at 53 schools and employs more than 5,000 staff members.

UCPS continues to outperform the state and several large districts in multiple testing and accountability areas. Most notably, the district's 2025 four-year cohort graduation rate is 93.2 percent, taking the top spot among the 12 largest schools districts in the state. This graduation cohort began high school in the 2021-2022 school year, against the backdrop of a world still navigating the pandemic. UCPS also outperformed the state's four-year cohort graduation rate of 87.7%.

UCPS offers a wide variety of coursework to its students, ranging from 23 dual language programs to STEM (science, technology, engineering and math) to more than 44 pathways and 24 academies in the career and technical education department. UCPS in partnership with Wingate University offers the Wayfind program each year to 40 middle school students.

UCPS students have access to a variety of academic options, including the Benton Heights Elementary School of the Arts, the International Baccalaureate Program at Marvin Ridge High School, Union County Early College, Central Academy of Technology and Arts, Health Sciences Academy at Monroe Middle and High with the addition of the AgTech Academy at East Union Middle and Forest Hills High Schools.

With a long-term goal of ensuring all students are equipped to succeed in college, career and life, UCPS is committed and dedicated to offering quality instruction for all children in support of our mission of "Preparing All Students to Succeed."

MAJOR INITIATIVES

UCPS is committed to a strategic framework that provides each student with the opportunity to receive a high-quality education and a safe school environment. Union County Board of Education is committed to the forward movement and expansion in academic programming, college and career readiness, equity, human capital development and continuous organizational improvement.

Union County Public Schools maintains a 5-year Strategic Plan to address five main goals or areas of focus:

- Goal 1: Expand opportunities and support all levels for college and career readiness.
- Goal 2: Enhance academic programs to meet the needs of all students.
- Goal 3: Engage parents and community.
- Goal 4: Support and develop UCPS employees.
- Goal 5: Foster positive learning experiences for all students.

The strategic plan includes two long-term outcomes: reducing gaps in student achievement and ensuring all students are equipped to succeed in college, career and life. To reach those outcomes, UCPS will focus on college and career readiness, academic programs, positive learning experiences, parent and community engagement and developing UCPS employees. Our students deserve the best. We must continue to push forward and ensure that all students are equipped with the tools they need to be successful.

In compliance with federal law, UCPS administers all educational programs, employment activities and admissions without discrimination against any person on the basis of gender, race, color, religion, national origin, age or disability.

FINANCIAL SYSTEM AND BUDGETARY CONTROLS

To meet the financial challenges facing public education, local boards of education must use a variety of funding sources including local, state, federal and private grants while complying with legal requirements of each funding source. In doing so, the Board is unable to summarize all governmental financial transactions and balances in one accounting entity. Instead, the accounting system is divided into separate entities; each referred to as a "Fund".

Each individual fund accounting entity records their operations under a set of self-balancing accounts comprising of assets, liabilities, fund equity, revenues and expenditures or expenses as appropriated.

The Board's funds are divided into governmental and proprietary. Each fund is considered a separate accounting entity, to record allocation of and account for governmental resources for which they are spent and controlled. The governmental fund types include the general fund, special revenue fund and capital fund. The enterprise funds are presented as proprietary fund types. All governmental fund types are accounted for and reported on the modified accrual basis of accounting in accordance with G.S. 115C-440(b). The enterprise funds are proprietary and are presented on a full accrual basis.

North Carolina General Statues requires all governmental units in the state to adopt a balanced budget by July 1st of each year. The Board has the final approval over the budget and primary accountability for fiscal matters (including any deficits). The Board's annual Budget Resolution authorizes expenditures by purpose and on a modified accrual basis. For internal management purposes, the budget is detailed and compared to expenditures and encumbrances by line item within each function and project. The budget amounts reflected in the accompanying financial statements represent the final budgets as amended for the fiscal year. The Board also uses a purchase order encumbrance system that records and shows encumbrances outstanding against each line item of expenditures. Outstanding encumbrances at the end of the fiscal year related to normal operations are considered to be continuing contracts and are transferred at the end of the fiscal year to appropriations in future years.

Internal accounting controls are a primary consideration in developing and improving the Board's accounting system. Internal controls are designed to provide reliability of financial records for preparing financial statements and maintaining accountability for assets and are to provide reasonable assurance regarding the safeguarding of assets from unauthorized use or disposition. The concept of reasonable assurance recognizes that the cost and benefits require estimates and judgments by management.

We believe that the Board's internal accounting controls adequately safeguard assets and provide reasonable assurance of proper recording of financial transactions.

INDEPENDENT AUDIT

The State statutes require an annual audit by independent certified public accountants and the Board has selected the firm of Anderson Smith & Wike, PLLC to audit the financial records and transactions for the year ending June 30, 2025. In addition to meeting the requirements set forth in North Carolina State Statues, the audit was designed to meet the requirements of the Federal Single Audit Act of 1984, as amended, the related audit requirements of Title II U.S. code of Federal Regulations Part 200, Uniform Administrative Requirements,

In compliance with federal law, UCPS administers all educational programs, employment activities and admissions without discrimination against any person on the basis of gender, race, color, religion, national origin, age or disability.

Cost Principals and Audit Requirements for Federal Awards (Uniform Guidance).

ACKNOWLEDGEMENTS

The preparation of this report could not have been completed without the dedicated efforts of the finance staff and the Board's independent certified public accounting firm, Anderson Smith & Wike, PLLC. We would like to express our appreciation to all employees who assisted in the timely closing of the Union County Board of Education's fiscal records as well as the preparation of this report.

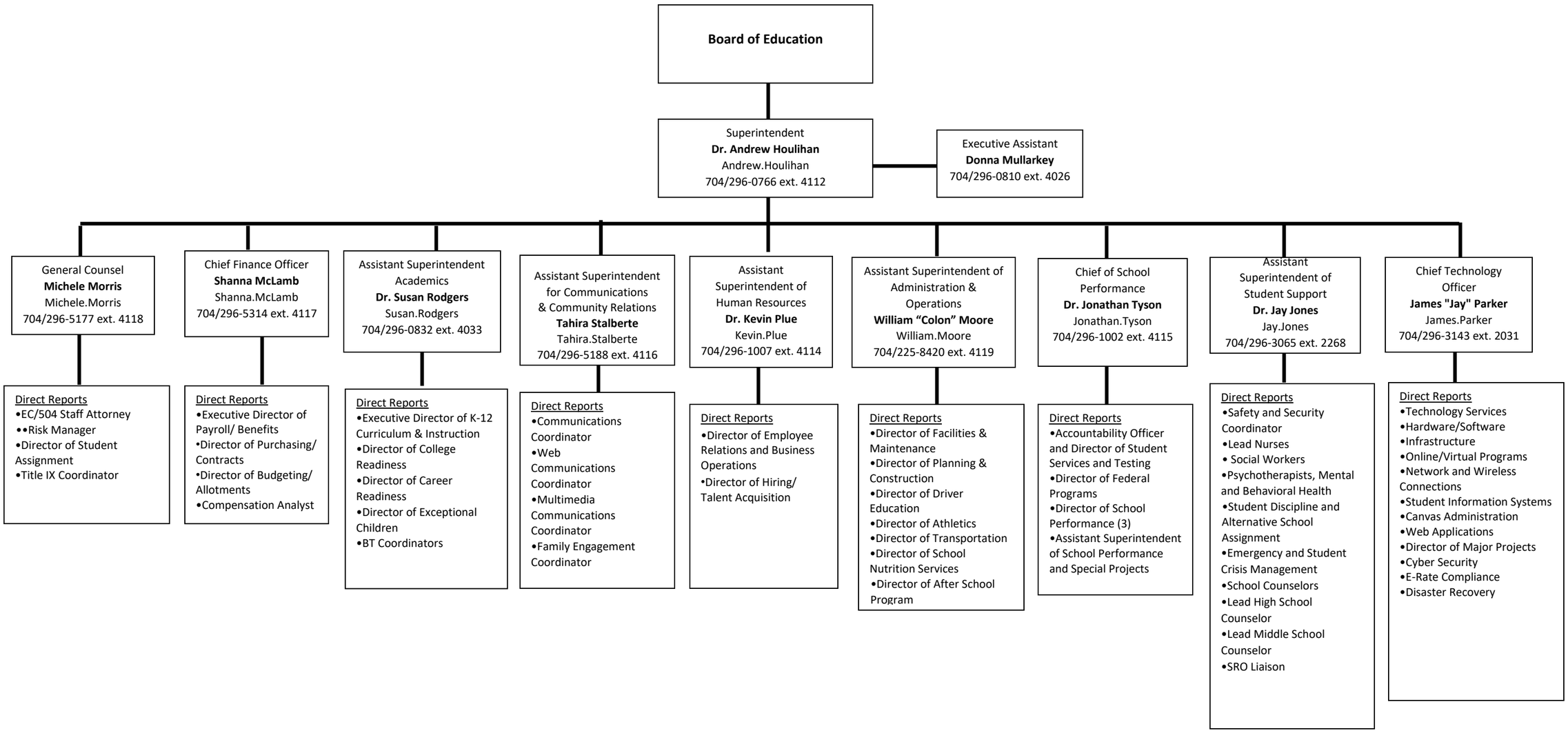
We would also like to express our appreciation to the members of The Board of Education for their continued support in planning and conducting the financial affairs of the school system in a professional and responsible manner and their continuous commitment to providing a quality education to all Union County Public School students.

Respectfully submitted,

Dr. Andrew G. Houlihan, Ed.D.
Superintendent

Shanna McLamb
Chief Financial Officer

In compliance with federal law, UCPS administers all educational programs, employment activities and admissions without discrimination against any person on the basis of gender, race, color, religion, national origin, age or disability.



Please note: All emails are @ucps.k12.nc.us 07/1/2025

Government Finance Officers Association

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Presented to

Union County Board of Education
North Carolina

For its Annual Comprehensive
Financial Report
For the Fiscal Year Ended

June 30, 2024

Christopher P. Morrill

Executive Director/CEO

Financial Section

INDEPENDENT AUDITORS' REPORT

To the Union County Board of Education
Monroe, North Carolina

Report on the Audit of the Financial Statements

Opinions

We have audited the accompanying financial statements of the governmental activities, the business-type activities and each major fund of the Union County Board of Education, as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise the Union County Board of Education's basic financial statements as listed in the table of contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities and each major fund of the Union County Board of Education, as of June 30, 2025, and the respective changes in financial position, and, where applicable, cash flows thereof and the respective budgetary comparison for the General, State Public School, Federal Grants and Other Special Revenue funds for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Union County Board of Education and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Change in Accounting Principle

As described in Note 5 to the financial statements, the Board adopted the provisions of GASB Statement No. 101, Compensated Absences, as of July 1, 2024. Our opinion is not modified with respect to this matter.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Union County Board of Education's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.

- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Union County Board of Education's internal control. Accordingly, no such opinion is expressed.

- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.

- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Union County Board of Education's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that Management's Discussion and Analysis on pages 4 through 12 and the Schedules of the Board's Proportionate Share of the Net Pension Liability, OPEB Liability and OPEB liability and the Schedules of Board Contributions on pages 53 through 58, respectively, be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Union County Board of Education's basic financial statements. The accompanying individual fund budgetary schedules and schedule of expenditures of federal and State awards, as required by Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, and the State Single Audit Implementation Act are presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the individual fund budgetary schedules and schedule of expenditures of federal and State awards are fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated December 17, 2025, on our consideration of the Union County Board of Education's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Union County Board of Education's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Union County Board of Education's internal control over financial reporting and compliance.

Anderson Smith & Wike PLLC

December 17, 2025
West End, North Carolina
(910) 603-0508

This section of the Union County Board of Education's (the "Board"*)* financial report represents our discussion and analysis of the financial performance of the Board for the year ended June 30, 2025. This information should be read in conjunction with the audited financial statements included in this report.

Financial Highlights

- As discussed in Note 5 to the financial statements, effective July 1, 2024, the Board implemented accounting and financial reporting requirements of GASB Statement 101, Compensated Absences. The statement required the Board to begin recording liabilities for employee sick leave balances that are more likely than not to be used. As a result of implementation of this statement, the Board's governmental and business-type activities net position, as previously reported at June 30, 2024, was reduced by $70.1 million and $1.9 million, respectively.

- For the fiscal year ended June 30, 2025, the Board's total district-wide net position (not including the decrease in net position due to the GASB 101 restatement) increased by $54.6 million. Governmental activities net position increased by $54.7 million, and business-type activities net position decreased by $69,000.

- The Board experienced a decrease in student enrollment of 416 students from 41,345 students to 40,929 students.

- The Board's General fund reported a decrease in fund balance of $1.5 million, to a balance of $8.3 million. The Board's Other Special Revenue fund reported an increase in fund balance of $832,000, to a balance of $8.3 million as of June 30, 2025.

Overview of the Financial Statements

The audited financial statements of the Union County Board of Education consist of five components. They are as follows:

- *Independent Auditors' Report*

- *Management's Discussion and Analysis (required supplementary information)*

- *Basic Financial Statements*

- *Required supplemental section that presents the Schedules of the Board's Proportionate Share of Net Pension and OPEB Liabilities (assets) and the Schedules of Board Contributions.*

- *Supplemental section that presents budgetary schedules for governmental and enterprise funds.*

The *Basic Financial Statements* include two types of statements that present different views of the Board's finances. The first is the *Government-wide Statements*. The government-wide statements are presented on the full accrual basis of accounting and include the statement of net position and the statement of activities. The statement of net position includes all of the Board's assets, deferred outflows of resources, liabilities and deferred inflows of resources. Assets and liabilities are classified in the order of relative liquidity for assets and due date for liabilities. This statement provides a summary of the Board's investment in assets, deferred outflows of resources, deferred inflows of resources and obligations to creditors. Liquidity and financial flexibility can be evaluated using the information contained in this statement. The statement of activities summarizes the Board's revenues and expenses for the current year. A net (expense) revenue format is used to indicate to what extent each function is self-sufficient.

The second set of statements included in the basic financial statements is the *Fund Financial Statements,* which are presented for the Board's governmental funds and proprietary funds. These statements present the governmental funds on the modified accrual basis of accounting, measuring the near term

inflows and outflows of financial resources and what is available at year-end to spend in the next fiscal year. The proprietary funds are presented on the full accrual basis of accounting. The fund financial statements focus on the Board's most significant funds. Because a different basis of accounting is used in the government-wide statements, reconciliation from the governmental fund financial statements to the government-wide statements is required. The government-wide statements provide information about the Board as an economic unit while the fund financial statements provide information on each of the financial resources of each of the Board's major funds.

Government-wide Statements

The government-wide statements report information about the unit as a whole using accounting methods similar to those used by private-sector companies. The statement of net position includes all of the Board's assets and liabilities. All of the current year's revenues and expenses are accounted for in the statement of activities regardless of when cash is received or paid.

The two government-wide statements report the Board's net position and how it has changed. Net position is the difference between the Board's assets and liabilities. This is one way to measure the unit's financial health or position.

- Over time, increases or decreases in the Board's net position are an indicator of whether its financial position is improving or deteriorating.
- To assess the Board's overall health, you need to consider additional non-financial factors such as changes in the district's property tax base and the condition of its school buildings and other physical assets.

The unit's activities are divided into two categories in the government-wide statements:

- *Governmental activities*: Most of the Board's basic services are included here, such as regular and special education, transportation, and administration. County funding and State and federal aid finance most of these activities.
- *Business-type activities*: The Board charges fees to help it cover the costs of certain services it provides. School food service and after school services are included here.

The government-wide statements are shown as Exhibits 1 and 2 of this report.

Fund Financial Statements

The fund financial statements provide more detailed information about the Board's funds, focusing on its most significant or "major" funds - not the unit as a whole. Funds are accounting devices the Board uses to keep track of specific sources of funding and spending on particular programs.

- Some funds are required by State law, such as the State Public School Fund.
- The Board has established other funds to control and manage money for a particular purpose or to show that it is properly using certain revenues, such as in the Federal Grants Fund.

Union County Board of Education has two types of funds:

Governmental funds: Most of the Board's basic services are included in the governmental funds, which generally focus on two things – 1) how cash and other assets that can readily be converted to cash flow in and out, and 2) the balances left at year-end that are available for spending. As a result of this focus, the governmental funds statements provide a detailed short-term view that helps the reader determine whether there are more or fewer financial resources that can be spent in the coming year to finance the Board's programs. Because this information does not encompass the additional long-term focus of the district-wide statements, additional information at the bottom of the governmental fund statements, in the

form of a reconciliation, explains the relationship (or differences) between them. The Board has several governmental funds: the General Fund, the State Public School Fund, the Individual Schools Fund, the Other Special Revenue fund, the Capital Outlay Fund and the Federal Grants Fund.

The governmental fund statements are shown as Exhibits 3, 4, 5 and 6 of this report.

Proprietary funds: Services for which the Board charges a fee are generally reported in the proprietary funds. The proprietary fund statements are reported on the same full accrual basis of accounting as the government-wide statements. Union County Board of Education has two proprietary funds - both enterprise funds – the School Food Service Fund and the After School Program Fund.

The proprietary fund statements are shown as Exhibits 7, 8, and 9 of this report.

Financial Analysis of the Board as a Whole

Assets and deferred outflows exceeded liabilities and deferred inflows of resources by $137.8 million as of June 30, 2025 as compared to assets and deferred outflows exceeding liabilities and deferred inflows by $155.2 million as of June 30, 2024, a decrease of $17.4 million. The largest component of net position is net investment in capital assets of $697.8 million, while restricted and unrestricted net position have a combined balance of negative $560.1 million. As previously discussed, this decrease is primarily due to the implementation of GASB Statement 101 during the year, which had the effect of reducing beginning of year total primary government net position, as previously reported at June 30, 2024, by $72.1 million.

Following is a summary of the Statement of Net Position as of June 30, 2025 and 2024:

Table 1
Condensed Statement of Net Position
As of June 30, 2025 and 2024

	Governmental Activities		Business-type Activities		Total Primary Government	
	6/30/25	6/30/24	6/30/25	6/30/24	6/30/25	6/30/24
Current assets	$ 39,759,031	$ 38,261,791	$ 9,693,845	$ 10,049,589	$ 49,452,876	$ 48,311,380
Capital assets	708,826,788	661,328,307	1,548,550	1,156,307	710,375,338	662,484,614
Total assets	748,585,819	699,590,098	11,242,395	11,205,896	759,828,214	710,795,994
Deferred outflows of resources	227,671,877	215,388,792	6,600,628	6,051,977	234,272,505	221,440,769
Current liabilities	45,924,137	26,987,255	1,303,989	835,871	47,228,126	27,823,126
Long-term liabilities	697,466,278	606,251,348	19,789,221	16,801,179	717,255,499	623,052,527
Total liabilities	743,390,415	633,238,603	21,093,210	17,637,050	764,483,625	650,875,653
Deferred inflows of resources	89,280,416	122,717,812	2,588,405	3,448,115	91,868,821	126,165,927
Net investment in capital assets	696,276,083	649,929,031	1,548,550	1,156,307	697,824,633	651,085,338
Restricted net position	10,825,512	12,805,200	16,723	-	10,842,235	12,805,200
Unrestricted net position (deficit)	(563,514,730)	(503,711,756)	(7,403,865)	(4,983,599)	(570,918,595)	(508,695,355)
Total net position (deficit)	$ 143,586,865	$ 159,022,475	$ (5,838,592)	$ (3,827,292)	$ 137,748,273	$ 155,195,183

Net position is an indicator of the fiscal health of the Board. Net of the $70.1 million reduction in beginning of year net position for implementation of GASB 101, the net position of the Board's governmental activities increased $54.7 million during the year, from $159.0 million at June 30, 2024 to $143.6 million at June 30, 2025 as a result of continued construction. Net investment in capital assets increased by $46.7 million as a result of capital additions exceeding depreciation expense for the year. The Board's restricted net position decreased by $2.0 million due to spending down Other Special Revenue restricted fund balance related to special revenue programs such as Medicaid. Unrestricted net position decreased by $59.8 million compared to the prior year, due to implementation of GASB 101. Deferred outflows and inflows of resources relate entirely to the pension and OPEB plans which the Board participates in. The Board is required to record its proportionate share of these items along with its proportionate share of the plan liabilities. See Note 2 of the financial statements for more details regarding these plans.

Net of a reduction of $1.9 million to beginning of year net position for implementation of GASB 101,The net position of the Board's business-type activities decreased $69,000 from $(3.8) million at June 30, 2024 to $(5.8) million at June 30, 2025. This decrease is the net loss generated by our School Food Service fund offset by the net income generated in the After School Program fund during the 2025 fiscal year. The following table shows the revenues and expenses for the Board for the current and prior fiscal years:

Table 2
Condensed Statement of Activities
For the Fiscal Years Ended June 30, 2025 and 2024

	Governmental Activities		Business-type Activities		Total Primary Government	
	6/30/25	6/30/24	6/30/25	6/30/24	6/30/25	6/30/24
Revenues:						
Program revenues:						
Charges for services	$ 13,404,598	$ 14,145,233	$ 10,614,941	$ 10,992,743	$ 24,019,539	$ 25,137,976
Operating grants and contributions	315,446,956	328,109,216	12,836,303	13,498,549	328,283,259	341,607,765
Capital grants and contributions	3,198,358	2,129,026	362,136	20,822	3,560,494	2,149,848
General revenues:						
County appropriations	218,251,062	204,862,982	-	-	218,251,062	204,862,982
Other revenues	5,680,609	2,765,812	189,816	81,398	5,870,425	2,847,210
Total revenues	555,981,583	552,012,269	24,003,196	24,593,512	579,984,779	576,605,781
Expenses:						
Governmental activities:						
Instructional services	373,543,797	372,017,013	-	-	373,543,797	372,017,013
System-wide support services	111,878,025	99,838,077	-	-	111,878,025	99,838,077
Ancillary services	520,433	156,122	-	-	520,433	156,122
Payments to other governments	14,356,558	12,915,890	-	-	14,356,558	12,915,890
Interest on long-term debt	375,259	448,437	-	-	375,259	448,437
Unallocated depreciation	559,126	468,002	-	-	559,126	468,002
Business-type activities:						
School food service	-	-	21,471,721	23,478,990	21,471,721	23,478,990
Child care	-	-	2,662,548	2,857,094	2,662,548	2,857,094
Total expenses	501,233,198	485,843,541	24,134,269	26,336,084	525,367,467	512,179,625
Transfers in (out)	(62,495)	(55,337)	62,495	55,337	-	-
Increase (decrease) in net position	54,685,890	66,113,391	(68,578)	(1,687,235)	54,617,312	64,426,156
Beginning net position (deficit), as previously reported	159,022,475	92,909,084	(3,827,292)	(2,140,057)	155,195,183	90,769,027
Change in accounting principle	(70,121,500)	-	(1,942,722)	-	(72,064,222)	-
Beginning net position (deficit) as restated	88,900,975	92,909,084	(5,770,014)	(2,140,057)	83,130,961	90,769,027
Ending net position (deficit)	$ 143,586,865	$ 159,022,475	$ (5,838,592)	$ (3,827,292)	$ 137,748,273	$ 155,195,183

Total governmental activities generated revenues of $556.0 million while expenses in this category totaled $501.2 million for the year ended June 30, 2025, resulting in an increase in net position of $54.7 million (including transfers out to business-type activities of $62,000). Comparatively, revenues were $552.0 million, expenses totaled $485.8 million and transfers out were $55,000 for the year ended June 30, 2024, resulting in an increase in net position of $66.1 million. In comparing the two years, revenues increased by $4.0 million or 0.7%, and expenses increased by $15.4 million, or 3.2%. The primary reason for the increase in revenues is the receipt of $86.9 million of County funds in the Capital Outlay fund for the construction of 2 new schools. Also included in the increase in both revenues and expenses is the increase in the State Public School fund allotments, which increased $5.3 million because of rising ADM and state mandated salary and benefit increases. Along with an increase in County funding in the General fund of $7.9 million. This increase in revenues was offset by a decline in the receipt of Education Stabilization funds to help offset the cost of the COVID-19 pandemic which has declined as a result of spending down allotments and the expiration of the COVID-19 allotments. This resulted in a decrease in both revenue and expenses of $18.2 million in the Federal Grants fund. The Board also recognized an increase in pension and OPEB expenses of $13.6 million, see Note 2 – Detail Notes to the basic financial statements for detailed information regarding these post employment benefit programs.

The Board's primary sources of revenues were funding from the State of North Carolina, Union County, and the United States Government, which respectively comprised 53.6%, 39.1% and 3.0% of our total revenues. As would be expected, the major component of our expenses was instructional services which accounted for 74.5% of our total expenses during the most recent fiscal year. Of the remaining 25.5% of our total expenses, 22.3% was attributable to system-wide support services.

Our business-type activities generated revenues of $24.0 million, while expenses in this category totaled $24.1 million for the year ended June 30, 2025. For the year, net position decreased by $69,000 (including transfers in of $62,000). Comparatively, revenues were $24.6 million, expenses were $26.3 million and transfers in were $55,000 for the year ended June 30, 2024, resulting in a decrease in net position of $1.7 million. In comparing the two years, revenues decreased by $590,000, and expenses decreased by $2.2 million, the decrease in revenues was recognized in the School Food Service fund due to decreases in participation. Food sales remained consistent compared to the previous year but USDA reimbursements decreased $511,000 as participation decreased. The Board also recognized a decrease in salary and benefits expense of $680,000, which is fully attributable to a decrease in pension and OPEB expense of $1.1 million. The Board's After School program recognized a slight decrease in fees of $184,000, however the decline in revenue was offset by a decline in salaries and benefits expense because of the allocation of pension and OPEB expenses to the program as lower salaries were paid by the program.

Financial Analysis of the Board's Funds

Governmental Funds: The focus of Union County Board of Education's governmental funds is to provide information on near-term inflows, outflows, and balances of usable resources. Such information is useful in assessing the Board's financing requirements.

The Board's governmental funds reported a combined fund balance of $25.0 million at June 30, 2025, a decrease of $293,000 from the amount reported at June 30, 2024. The Board's General fund reported expenditures over revenues for the year ended June 30, 2025 of $1.5 million, while the Other Special Revenue, Individual School and Capital Outlay funds reported increases in fund balance of $832,000, $223,000 and $143,000, respectively. Overall, total governmental fund revenues increased by $3.2 million or 0.6%, while total expenditures increased by $2.6 million, or 0.5% over the prior year.

For the year, the Board's General Fund reported a decrease in fund balance of $1.5 million compared to a decrease of $737,000 in the prior year. Revenues increased by $7.9 million, or 6.4%, over the prior year primarily due to increased funding from County appropriations. Expenditures increased $8.7 million, or 7.0%. An increase in both instructional services costs and payments to charter schools attributed to the overall increase in expenditures.

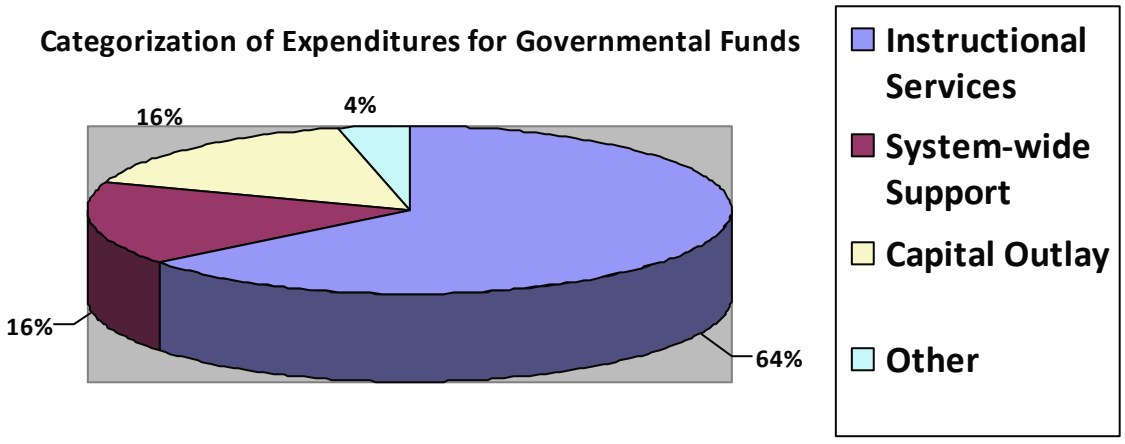
The State Public School Fund and Federal Grants Fund do not carry fund balance. All revenues in these funds are expended in the year received. In comparing the year ended June 30, 2025 to 2024, the State Public School Fund reported an increase in revenues (and expenditures) of $5.3 million, or 1.8% due to the allotments received to fund state mandated salary increases. The Federal Grants Fund reported a decrease of $18.2 million, or 53.4% as a result of the COVID-19 funds received expiring during the current year. These COVID-19 Education Stabilization funds were spent within the prior year to help offset the cost of the coronavirus pandemic and provide bonuses and additional duties pay to employees employed during the pandemic and provide additional services to address learning loss and overall student health and air quality.

The Other Special Revenue Fund reported fund balance of $8.3 million at June 30, 2025, an increase for the year of $832,000 compared to a decrease of $3.8 million in the 2024 year. Revenues decreased $2.2 million from the previous year, while expenditures increased by $1.1 million as more locally funded expenditures were paid out of the rising fund balance within this fund. Revenues increased $2.7 million due to receipt of a $2.1 million E-rate reimbursement and an increase in Medicaid reimbursements. Indirect cost revenues decreased by $726,000, due primarily to indirect costs not charged to the School Food Service fund to prevent significant decreases in cash balances in that fund.

The Capital Outlay Fund reported fund balance of $2.7 million at June 30, 2025, an increase of $143,000 from the prior year. The most significant revenue reported in the Capital Outlay Fund was $86.9 million from Union County appropriations to fund various construction, renovation and maintenance projects. The district also received $4.9 million from installment purchase agreements entered into to pay for DPI buses and purchase computers.

The Individual School fund benefited from continued strong revenues from fundraisers, sporting events and field trips, revenues exceeded expenditures in the Individual School fund by $223,000.

The following chart summarizes governmental fund expenditures:



Expenditures presented on modified accrual basis of accounting.

Proprietary Fund: The Board's business-type funds, the School Food Service Fund and the After School Program Fund, reported a combined decrease in net position of $69,000 for the fiscal year ended June 30, 2025 compared to a decrease of $1.7 million for the same 2024 period. See the discussion above under "*Financial Analysis of the Board as a Whole*" for further details regarding the year-over-year change in operating results for these two funds.

General Fund Budgetary Highlights

Over the course of the year, the Board revised the budget several times to account for changes in revenue expectations and program allocations. Since several revenue sources are either unknown or uncertain at the beginning of the fiscal year when the original budget is adopted, budget revisions are often necessary throughout the year to recognize these adjustments. The Board's General Fund reported a decrease in fund balance for the year ended June 30, 2025 of $1.5 million, compared to a decrease of $737,000 in 2024. Through effective cost-containment and budget management practices, the Board was able to keep expenditures below budget and only use $1.5 million of the $2.5 million of fund balance that had been appropriated.

Capital Assets

Total primary government capital assets were $710.4 million at June 30, 2025 compared to $662.5 million at June 30, 2024, an increase of 7.2%. The increase is attributable to an excess of capital additions over depreciation expense for the year. More detailed information about the Board's capital assets is contained in Note 2 – Detail Notes to the basic financial statements.

The following is a summary of the Board's capital assets, net of depreciation, at June 30, 2025 and 2024:

Table 3
Summary of Capital Assets
As of June 30, 2025 and 2024

	Governmental Activities		Business-type Activities		Total Primary Government	
	6/30/25	6/30/24	6/30/25	6/30/24	6/30/25	6/30/24
Land	$ 64,242,660	$ 64,242,660	$ -	$ -	$ 64,242,660	$ 64,242,660
Construction in progress	126,928,256	68,650,586	-	-	126,928,256	68,650,586
Buildings and improvements	500,591,867	512,953,155	-	-	500,591,867	512,953,155
Equipment and furniture	5,005,971	3,575,484	1,548,550	1,156,307	6,554,521	4,731,791
Vehicles	12,058,034	11,906,422	-	-	12,058,034	11,906,422
Total	$ 708,826,788	$ 661,328,307	$ 1,548,550	$ 1,156,307	$ 710,375,338	$ 662,484,614

Debt Outstanding

During the year, the Board's long-term debt increased from $13.1 million at June 30, 2024 to $13.5 million at June 30, 2025. The Board is limited by North Carolina General Statutes with regards to the types of debt it can issue and for what purpose that debt can be used. The County holds virtually all debt issued for school capital construction. More detailed information about the Board's outstanding debt is contained in Note 2- Detail Notes to the basic financial statements.

Economic Factors

The Board anticipates an increased enrollment over the next several years and will need continued increases in classroom space, teachers and equipment. County funding is a major source of income for the Board; therefore, the County's economic outlook directly affects that of the school district. The following factors have affected the economic outlook of Union County.

- Union County's population estimation of approximately 269,300 is an increase of approximately 12.3% since 2020. Union County also has the 10th largest population growth since 2010 in the State. The future expected growth in the County will continue to increase the demands on funding sources for the Board.

- The unadjusted unemployment rate in Union County at June 30, 2025 was 3.4%, slightly below that of the State at 3.7%.

Requests for Information

This report is intended to provide a summary of the financial condition of Union County Board of Education. Questions or requests for additional information should be addressed to:

Shanna McLamb, Chief Finance Officer
Union County Board of Education
400 N. Church Street
Monroe, NC 28112

GOVERNMENT-WIDE FINANCIAL STATEMENTS

	Primary Government		
	Governmental Activities	Business-type Activities	Total
Assets			
Cash and cash equivalents	$ 23,701,117	$ 8,800,455	$ 32,501,572
Investments	5,827,558	-	5,827,558
Due from other governments	9,662,676	294,113	9,956,789
Receivables	162,376	318,994	481,370
Inventories	-	268,533	268,533
Net OPEB asset	405,304	11,750	417,054
Capital assets:			
Land and construction in progress	191,170,916	-	191,170,916
Other capital assets, net of depreciation	517,655,872	1,548,550	519,204,422
Total capital assets	708,826,788	1,548,550	710,375,338
Total assets	748,585,819	11,242,395	759,828,214
Deferred Outflows of Resources	227,671,877	6,600,628	234,272,505
Liabilities			
Accounts payable and accrued expenses	13,611,726	205,895	13,817,621
Unearned revenue	767,638	389,067	1,156,705
Long-term liabilities:			
Due within one year	31,544,773	709,027	32,253,800
Due in more than one year	71,951,618	1,654,396	73,606,014
Net pension liability	211,314,285	6,126,391	217,440,676
Net OPEB liability	414,200,375	12,008,434	426,208,809
Total liabilities	743,390,415	21,093,210	764,483,625
Deferred Inflows of Resources	89,280,416	2,588,405	91,868,821
Net position			
Net investment in capital assets	696,276,083	1,548,550	697,824,633
Restricted for:			
Stabilization by State statute	633,242	-	633,242
School capital outlay	2,766,734	-	2,766,734
Instructional services	1,230,789	-	1,230,789
Individual schools activities	5,617,918	-	5,617,918
DIPNC OPEB plan	576,829	16,723	593,552
Unrestricted (deficit)	(563,514,730)	(7,403,865)	(570,918,595)
Total net position (deficit)	$ 143,586,865	$ (5,838,592)	$ 137,748,273

The notes to the basic financial statements are an integral part of this statement.

UNION COUNTY BOARD OF EDUCATION
STATEMENT OF ACTIVITIES
For the Fiscal Year Ended June 30, 2025

Exhibit 2

Functions/Programs	Expenses	Program Revenues: Charges for Services	Program Revenues: Operating Grants and Contributions	Program Revenues: Capital Grants and Contributions	Net (Expense) Revenue and Changes in Net Position: Primary Government: Governmental Activities	Primary Government: Business-type Activities	Primary Government: Total
Primary government:							
Governmental activities:							
Instructional services:							
Regular instructional	$ 231,257,640	$ -	$ 184,562,945	$ -	$ (46,694,695)	$ -	$ (46,694,695)
Special populations	57,241,100	-	49,531,471	-	(7,709,629)	-	(7,709,629)
Alternative programs	13,517,805	-	8,926,462	-	(4,591,343)	-	(4,591,343)
School leadership	27,270,797	-	12,494,012	-	(14,776,785)	-	(14,776,785)
Co-curricular	13,546,646	11,234,503	-	-	(2,312,143)	-	(2,312,143)
School-based support	30,709,809	-	20,470,901	-	(10,238,908)	-	(10,238,908)
System-wide support services:							
Support and development	3,250,814	-	238,769	-	(3,012,045)	-	(3,012,045)
Special population support and development	789,094	-	350,093	-	(439,001)	-	(439,001)
Alternative programs and services support and development	241,233	-	81,849	-	(159,384)	-	(159,384)
Technology support	20,801,317	-	1,954,635	-	(18,846,682)	-	(18,846,682)
Operational support	72,672,853	-	35,206,597	3,198,358	(34,267,898)	-	(34,267,898)
Financial and human resource services	8,784,460	2,170,095	172,932	-	(6,441,433)	-	(6,441,433)
Accountability	488,095	-	-	-	(488,095)	-	(488,095)
System-wide pupil support	616,604	-	-	-	(616,604)	-	(616,604)
Policy, leadership and public relations	4,233,555	-	581,494	-	(3,652,061)	-	(3,652,061)
Ancillary services	520,433	-	76,220	-	(444,213)	-	(444,213)
Non-programmed charges	14,356,558	-	798,576	-	(13,557,982)	-	(13,557,982)
Interest on long-term debt	375,259	-	-	-	(375,259)	-	(375,259)
Unallocated depreciation expense**	559,126	-	-	-	(559,126)	-	(559,126)
Total governmental activities	501,233,198	13,404,598	315,446,956	3,198,358	(169,183,286)	-	(169,183,286)
Business-type activities:							
School food service	21,471,721	7,594,668	12,836,303	362,136	-	(678,614)	(678,614)
After School Program	2,662,548	3,020,273	-	-	-	357,725	357,725
Total business-type activities	24,134,269	10,614,941	12,836,303	362,136	-	(320,889)	(320,889)
Total primary government	$ 525,367,467	$ 24,019,539	$ 328,283,259	$ 3,560,494	(169,183,286)	(320,889)	(169,504,175)
General revenues:							
Unrestricted county appropriations - operating					131,369,765	-	131,369,765
Unrestricted county appropriations - capital					86,881,297	-	86,881,297
Investment earnings, unrestricted					1,116,673	189,816	1,306,489
Miscellaneous, unrestricted					4,563,936	-	4,563,936
Transfers					(62,495)	62,495	-
Total general revenues and transfers					223,869,176	252,311	224,121,487
Change in net position					54,685,890	(68,578)	54,617,312
Net position (deficit) - beginning, as previously reported					159,022,475	(3,827,292)	155,195,183
Change in accounting principle (Note 5)					(70,121,500)	(1,942,722)	(72,064,222)
Net position (deficit) - beginning, as restated					88,900,975	(5,770,014)	83,130,961
Net position (deficit) - ending					$ 143,586,865	$ (5,838,592)	$ 137,748,273

**This amount excludes the depreciation that is included in the direct expenses of the various programs.

The notes to the basic financial statements are an integral part of this statement.

FUND FINANCIAL STATEMENTS

	Major Funds						
	General	State Public School	Federal Grants	Other Special Revenue	Capital Outlay	Individual Schools	Total Governmental Funds
Assets							
Cash and cash equivalents	$ 8,545,670	$ -	$ -	$ 4,855,285	$ 4,682,244	$ 5,617,918	$ 23,701,117
Investments	1,580,175	-	-	4,247,383	-	-	5,827,558
Due from other governments	122,718	-	-	64,330	9,475,628	-	9,662,676
Accounts receivable	53,978	-	-	94,417	13,981	-	162,376
Total assets	$ 10,302,541	$ -	$ -	$ 9,261,415	$ 14,171,853	$ 5,617,918	$ 39,353,727
Liabilities and fund balances							
Liabilities:							
Accounts payable and accrued liabilities	$ 2,028,993	$ -	$ -	$ 177,614	$ 11,405,119	$ -	$ 13,611,726
Unearned revenue	-	-	-	767,638	-	-	767,638
Total liabilities	2,028,993	-	-	945,252	11,405,119	-	14,379,364
Fund balances:							
Restricted:							
Stabilization by State statute	439,812	-	-	193,430	-	-	633,242
School capital outlay	-	-	-	-	2,766,734	-	2,766,734
Special revenue programs	-	-	-	1,230,789	-	-	1,230,789
Individual schools	-	-	-	-	-	5,617,918	5,617,918
Assigned:							
Subsequent year's expenditures	-	-	-	5,287,447	-	-	5,287,447
Special revenues	-	-	-	1,604,497	-	-	1,604,497
Unassigned	7,833,736	-	-	-	-	-	7,833,736
Total fund balances	8,273,548	-	-	8,316,163	2,766,734	5,617,918	24,974,363
Total liabilities and fund balances	$ 10,302,541	$ -	$ -	$ 9,261,415	$ 14,171,853	$ 5,617,918	$ 39,353,727

The notes to the basic financial statements are an integral part of this statement.

Amounts reported for governmental activities in the statement of net position (Exhibit 1) are different because of the following:

Total fund balance (All Governmental Funds)	24,974,363
Capital assets used in governmental activities are not financial resources and therefore are not reported in the funds.	708,826,788
Net OPEB asset	405,304
Deferred outflows of resources related to pensions	98,147,105
Deferred outflows of resources related to OPEB plans	129,524,772
Some liabilities, including those for compensated absences, are not due and payable in the current period and therefore are not reported in the funds.	(103,496,391)
Net pension liability	(211,314,285)
Net OPEB liability	(414,200,375)
Deferred inflows of resources related to pensions	(7,250,526)
Deferred inflows of resources related to OPEB plans	(82,029,890)
Net position of governmental activities	$ 143,586,865

UNION COUNTY BOARD OF EDUCATION
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES
GOVERNMENTAL FUNDS
For the Fiscal Year Ended June 30, 2025

Exhibit 4

	Major Funds						
	General	State Public School	Federal Grants	Other Special Revenue	Capital Outlay	Individual Schools	Total Governmental Funds
Revenues:							
State of North Carolina	$ -	$ 295,271,528	$ -	$ 185,500	$ 3,198,358	$ -	$ 298,655,386
Union County							
Local current expense	130,611,680	-	-	-	-	-	130,611,680
Other	-	-	-	-	86,881,297	-	86,881,297
U.S. Government	-	113,266	15,824,750	622,839	-	-	16,560,855
Other	1,135,009	-	-	11,394,995	337,556	11,234,503	24,102,063
Total revenues	131,746,689	295,384,794	15,824,750	12,203,334	90,417,211	11,234,503	556,811,281
Expenditures:				9,483,664			
Current:				2,719,670			
Instructional services:							
Regular instructional	29,725,499	182,475,479	1,148,250	2,521,208	-	-	215,870,436
Special populations	4,943,627	39,284,136	7,149,210	6,915,045	-	-	58,292,018
Alternative programs	4,456,415	3,878,402	5,048,060	411,094	-	-	13,793,971
School leadership	15,327,676	12,206,366	287,646	-	-	-	27,821,688
Co-curricular	2,604,551	-	-	12,962	-	11,011,290	13,628,803
School-based support	10,164,394	19,231,183	1,054,218	860,613	-	-	31,310,408
System-wide support services:							
Support and development	3,073,972	238,769	-	4,905	-	-	3,317,646
Special population support and development	450,529	154,128	195,965	5,892	-	-	806,514
Alternative programs and services support and development	165,128	5,536	76,313	-	-	-	246,977
Technology support	4,510,458	1,954,635	-	126,618	-	-	6,591,711
Operational support	29,724,843	35,139,239	4,863	167,194	-	-	65,036,139
Financial and human resource services	8,651,803	172,932	-	96,676	-	-	8,921,411
Accountability	455,541	-	-	38,817	-	-	494,358
System-wide pupil support	626,525	-	-	-	-	-	626,525
Policy, leadership and public relations	3,749,999	581,494	-	250	-	-	4,331,743
Ancillary services	288,532	-	61,649	170,252	-	-	520,433
Non-programmed charges	14,317,883	-	798,576	40,164	-	-	15,156,623
Debt service:							
Principal retirement	-	-	-	-	4,470,920	-	4,470,920
Interest and fees	-	-	-	-	375,259	-	375,259
Capital outlay	-	-	-	-	90,372,303	-	90,372,303
Total expenditures	133,237,375	295,322,299	15,824,750	11,371,690	95,218,482	11,011,290	561,985,886
Revenues over (under) expenditures	(1,490,686)	62,495	-	831,644	(4,801,271)	223,213	(5,174,605)
Other financing sources (uses):				13,246,670	1,874,980		
Transfers from (to) other funds	-	(62,495)	-	-	-	-	(62,495)
Installment purchase obligations issued	-	-	-	-	4,944,060	-	4,944,060
Total other financing sources (uses)	-	(62,495)	-	-	4,944,060	-	4,881,565
Net change in fund balance	(1,490,686)	-	-	831,644	142,789	223,213	(293,040)
Fund balances:							
Beginning of year	9,764,234	-	-	7,484,519	2,623,945	5,394,705	25,267,403
End of year	$ 8,273,548	$ -	$ -	$ 8,316,163	$ 2,766,734	$ 5,617,918	$ 24,974,363

The notes to the basic financial statements are an integral part of this statement.

Amounts reported for governmental activities in the statement of activities are different because:

Net changes in fund balances - total governmental funds	$	(293,040)
Governmental funds report capital outlays as expenditures. However, in the Statement of Activities, the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense. This is the amount by which capital outlays exceeded depreciation in the current period.		47,511,864
Contributions to the pension plan in the current fiscal year are not included on the Statement of Activities		43,121,028
Contributions to the OPEB plans in the current fiscal year are not included on the Statement of Activities		18,285,986
Proceeds from the sale of capital assets are recorded as revenues in the fund statements but not in the statement of activities.		(29,633)
Revenues in the statement of activities that do not provide current financial resources are not reported as revenues in the funds.		
OPEB nonemployer contributions		126,015
Gain on disposal of capital assets		16,250
The issuance of long-term debt provides current financial resources to governmental funds, while the repayment of the principal of long-term debt consumes the current financial resources of governmental funds. Neither transaction has any effect on net position. Also, governmental funds report the effect of issuance costs, premiums, discounts and similar items when debt is first issued, whereas these amounts are deferred and amortized in the statement of activities. This amount is the net effect of these differences in the treatment of long-term debt and related items.		(473,140)
Some expenses reported in the statement of activities do not require the use of current financial resources and therefore are not reported as expenditures in governmental funds.		
Pension (expense) benefit		(52,524,928)
OPEB (expense) benefit		(2,893,464)
Compensated absences		1,838,952
Total changes in net position of governmental activities	$	54,685,890

The notes to the basic financial statements are an integral part of this statement.

UNION COUNTY BOARD OF EDUCATION ***Exhibit 6***
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL
GENERAL FUND AND ANNUALLY BUDGETED MAJOR SPECIAL REVENUE FUNDS
For the Fiscal Year Ended June 30, 2025

	General Fund			
	Original Budget	Final Budget	Actual	Variance With Final Budget
Revenues:				
State of North Carolina	$ -	$ -	$ -	$ -
Union County	130,611,680	130,611,680	130,611,680	-
U.S. Government	-	-	-	-
Other	760,000	1,135,009	1,135,009	-
Total revenues	131,371,680	131,746,689	131,746,689	-
Expenditures:				
Current:				
Instructional services				
Regular instructional	30,858,153	29,747,778	29,725,499	22,279
Special populations	4,960,449	4,960,449	4,943,627	16,822
Alternative programs	5,413,543	4,463,543	4,456,415	7,128
School leadership	13,750,313	15,327,899	15,327,676	223
Co-curricular	2,509,850	2,634,850	2,604,551	30,299
School-based support	10,223,627	10,223,627	10,164,394	59,233
System-wide support services				
Support and development	3,177,253	3,177,253	3,073,972	103,281
Special populations	408,978	450,530	450,529	1
Alternative programs	176,490	176,490	165,128	11,362
Technology support	4,400,773	4,538,479	4,510,458	28,021
Operational support	29,722,233	29,915,638	29,724,843	190,795
Financial and human resource	9,160,881	8,952,195	8,651,803	300,392
Accountability	636,630	511,630	455,541	56,089
System-wide pupil support	584,953	628,851	626,525	2,326
Policy, leadership and public relations	3,746,326	3,827,741	3,749,999	77,742
Ancillary services				
Community	-	-	-	-
Nutrition	442,377	360,962	288,532	72,430
Nonprogrammed charges	13,667,960	14,317,883	14,317,883	-
Total expenditures	133,840,789	134,215,798	133,237,375	978,423
Excess (deficiency) of revenues over expenditures	(2,469,109)	(2,469,109)	(1,490,686)	978,423
Other financing uses:				
Transfers to other funds	-	-	-	-
Fund balance appropriated	2,469,109	2,469,109	-	(2,469,109)
Net change in fund balance	$ -	$ -	(1,490,686)	$ (1,490,686)
Fund balances:				
Beginning of year			9,764,234	
End of year			$ 8,273,548	

The notes to the basic financial statements are an integral part of this statement.

STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL

GENERAL FUND AND ANNUALLY BUDGETED MAJOR SPECIAL REVENUE FUNDS

For the Fiscal Year Ended June 30, 2025

	State Public School Fund			
	Original Budget	Final Budget	Actual	Variance With Final Budget
Revenues:				
State of North Carolina	$ 297,448,112	$ 305,146,471	$ 295,271,528	$ (9,874,943)
Union County	-	-	-	-
U.S. Government	-	113,266	113,266	-
Other	-	-	-	-
Total revenues	297,448,112	305,259,737	295,384,794	(9,874,943)
Expenditures:				
Current:				
Instructional services				
Regular instructional	188,771,954	187,266,210	182,475,479	4,790,731
Special populations	41,507,405	40,376,711	39,284,136	1,092,575
Alternative programs	5,024,029	5,543,046	3,878,402	1,664,644
School leadership	11,202,916	12,431,407	12,206,366	225,041
Co-curricular	6,988	6,988	-	6,988
School-based support	11,816,564	19,292,628	19,231,183	61,445
System-wide support services				
Support and development	327,490	327,490	238,769	88,721
Special populations	346,291	346,291	154,128	192,163
Alternative programs	4,522	6,022	5,536	486
Technology support	2,039,598	3,250,277	1,954,635	1,295,642
Operational support	35,405,233	35,356,634	35,139,239	217,395
Financial and human resource	338,362	338,362	172,932	165,430
Accountability	1,119	1,119	-	1,119
System-wide pupil support	14,073	14,073	-	14,073
Policy, leadership and public relations	639,983	639,983	581,494	58,489
Ancillary services				
Community	-	-	-	-
Nutrition	-	-	-	-
Nonprogrammed charges	-	-	-	-
Total expenditures	297,446,527	305,197,241	295,322,299	9,874,942
Excess (deficiency) of revenues over expenditures	1,585	62,496	62,495	(1)
Other financing uses:				
Transfers to other funds	(1,585)	(62,496)	(62,495)	1
Fund balance appropriated	-	-	-	-
Net change in fund balance	$ -	$ -	-	$ -
Fund balances:				
Beginning of year			-	
End of year			$ -	

The notes to the basic financial statements are an integral part of this statement.

UNION COUNTY BOARD OF EDUCATION ***Exhibit 6 (continued)***
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL
GENERAL FUND AND ANNUALLY BUDGETED MAJOR SPECIAL REVENUE FUNDS
For the Fiscal Year Ended June 30, 2025

	Federal Grants Fund			
	Original Budget	Final Budget	Actual	Variance With Final Budget
Revenues:				
State of North Carolina	$ -	$ -	$ -	$ -
Union County	-	-	-	-
U.S. Government	22,483,655	22,511,073	15,824,750	(6,686,323)
Other	-	-	-	-
Total revenues	22,483,655	22,511,073	15,824,750	(6,686,323)
Expenditures:				
Current:				
Instructional services				
Regular instructional	1,667,626	1,357,299	1,148,250	209,049
Special populations	9,341,784	9,722,368	7,149,210	2,573,158
Alternative programs	7,440,235	6,553,064	5,048,060	1,505,004
School leadership	203,457	311,011	287,646	23,365
Co-curricular	-	-	-	-
School-based support	957,243	1,560,192	1,054,218	505,974
System-wide support services				
Support and development	125,000	-	-	-
Special populations	158,415	223,041	195,965	27,076
Alternative programs	108,082	115,196	76,313	38,883
Technology support	-	-	-	-
Operational support	20,155	23,292	4,863	18,429
Financial and human resource	-	-	-	-
Accountability	-	-	-	-
System-wide pupil support	-	-	-	-
Policy, leadership and public relations	-	-	-	-
Ancillary services				
Community	-	-	-	-
Nutrition	35,940	61,651	61,649	2
Nonprogrammed charges	2,425,718	2,583,959	798,576	1,785,383
Total expenditures	22,483,655	22,511,073	15,824,750	6,686,323
Excess (deficiency) of revenues over expenditures	-	-	-	-
Other financing uses:				
Transfers to other funds	-	-	-	-
Fund balance appropriated	-	-	-	-
Net change in fund balance	$ -	$ -	-	$ -
Fund balances:				
Beginning of year			-	
End of year			$ -	

The notes to the basic financial statements are an integral part of this statement.

UNION COUNTY BOARD OF EDUCATION ***Exhibit 6 (continued)***
STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES - BUDGET AND ACTUAL
GENERAL FUND AND ANNUALLY BUDGETED MAJOR SPECIAL REVENUE FUNDS
For the Fiscal Year Ended June 30, 2025

	Other Special Revenue Fund			
	Original Budget	Final Budget	Actual	Variance With Final Budget Positive (Negative)
Revenues:				
State of North Carolina	$ -	$ 185,000	$ 185,500	$ 500
Union County	-	-	-	-
U.S. Government	594,909	609,480	622,839	13,359
Other	4,059,336	6,827,840	11,394,995	4,567,155
Total revenues	4,654,245	7,622,320	12,203,334	4,581,014
Expenditures:				
Current:				
Instructional services				
Regular instructional	3,658,416	3,752,356	2,521,208	1,231,148
Special populations	5,259,208	7,547,582	6,915,045	632,537
Alternative programs	268,434	413,094	411,094	2,000
School leadership	-	-	-	-
Co-curricular	41,705	39,705	12,962	26,743
School-based support	957,656	1,118,747	860,613	258,134
System-wide support services				
Support and development	10,237	10,237	4,905	5,332
Special populations	4,000	6,000	5,892	108
Alternative programs	-	-	-	-
Technology support	450,000	450,000	126,618	323,382
Operational support	799,253	871,803	167,194	704,609
Financial and human resource	14,700	96,700	96,676	24
Accountability	26,213	38,818	38,817	1
System-wide pupil support	-	-	-	-
Policy, leadership and public relations	200	250	250	-
Ancillary services				
Community	156,094	244,052	155,681	88,371
Nutrition	-	24,571	14,571	10,000
Nonprogrammed charges	142,895	143,171	40,164	103,007
Total expenditures	11,789,011	14,757,086	11,371,690	3,385,396
Excess (deficiency) of revenues over expenditures	(7,134,766)	(7,134,766)	831,644	7,966,410
Other financing uses:				
Transfers to other funds	-	-	-	-
Fund balance appropriated	7,134,766	7,134,766	-	(7,134,766)
Net change in fund balance	$ -	$ -	831,644	$ 831,644
Fund balances:				
Beginning of year			7,484,519	
End of year			$ 8,316,163	

The notes to the basic financial statements are an integral part of this statement.

UNION COUNTY BOARD OF EDUCATION ***Exhibit 7***
STATEMENT OF NET POSITION
PROPRIETARY FUND TYPES
June 30, 2025

	Enterprise Major Funds		
	School Food Service	After School Program	Totals
Assets			
Current assets:			
Cash and cash equivalents	$ 6,675,898	$ 2,124,557	$ 8,800,455
Due from other governments	294,113	-	294,113
Receivables	308,289	10,705	318,994
Inventories	268,533	-	268,533
Total current assets	7,546,833	2,135,262	9,682,095
Noncurrent assets:			
Net OPEB asset	10,205	1,545	11,750
Capital assets:			
Furniture, equipment and vehicles, net	1,548,550	-	1,548,550
Total noncurrent assets	1,558,755	1,545	1,560,300
Total assets	9,105,588	2,136,807	11,242,395
Deferred Outflows of Resources	5,732,647	867,981	6,600,628
Liabilities			
Current liabilities:			
Accounts payable and accrued liabilities	201,459	4,436	205,895
Compensated absences	599,785	109,242	709,027
Unearned revenue	351,008	38,059	389,067
Total current liabilities	1,152,252	151,737	1,303,989
Noncurrent liabilities:			
Net pension liability	5,320,773	805,618	6,126,391
Net OPEB liability	10,429,330	1,579,104	12,008,434
Compensated absences	1,399,497	254,899	1,654,396
Total noncurrent liabilities	17,149,600	2,639,621	19,789,221
Total liabilities	18,301,852	2,791,358	21,093,210
Deferred Inflows of Resources	2,248,031	340,374	2,588,405
Net position			
Investment in capital assets	1,548,550	-	1,548,550
Restricted for DIPNC OPEB plan	14,524	2,199	16,723
Unrestricted (deficit)	(7,274,722)	(129,143)	(7,403,865)
Total net position (deficit)	$ (5,711,648)	$ (126,944)	$ (5,838,592)

The notes to the basic financial statements are an integral part of this statement.

UNION COUNTY BOARD OF EDUCATION ***Exhibit 8***
STATEMENT OF REVENUES, EXPENSES, AND CHANGES IN FUND NET POSITION
PROPRIETARY FUND TYPES
For the Fiscal Year Ended June 30, 2025

	Enterprise		
	Major Funds		
	School Food Service	After School Program	Totals
Operating revenues:			
Food sales	$ 7,594,668	$ -	$ 7,594,668
Child care fees	-	3,020,273	3,020,273
Total operating revenues	7,594,668	3,020,273	10,614,941
Operating expenses:			
Food cost:			
Purchase of food	7,265,042	149,703	7,414,745
Donated commodities	1,232,161	-	1,232,161
Salaries and benefits	11,988,635	2,249,702	14,238,337
Materials and supplies	98,310	115,357	213,667
Repairs and maintenance	61,591	-	61,591
Depreciation	268,895	-	268,895
Non-capitalized equipment	120,068	-	120,068
Contracted services	215,080	3,328	218,408
Field trips	-	31,447	31,447
Bank service fees	-	91,154	91,154
Other	221,939	21,857	243,796
Total operating expenses	21,471,721	2,662,548	24,134,269
Operating income (loss)	(13,877,053)	357,725	(13,519,328)
Nonoperating revenues:			
Federal reimbursements	11,570,900	-	11,570,900
Federal commodities	1,232,161	-	1,232,161
State reimbursements	33,242	-	33,242
Interest earned	177,224	12,592	189,816
Total nonoperating revenues	13,013,527	12,592	13,026,119
Income (loss) before transfers and contributions	(863,526)	370,317	(493,209)
Transfers from other funds	62,495	-	62,495
Capital contributions	362,136	-	362,136
Change in net position	(438,895)	370,317	(68,578)
Net position (deficit), beginning, as previously reported	(3,611,698)	(215,594)	(3,827,292)
Change in accounting principle (Note 5)	(1,661,055)	(281,667)	(1,942,722)
Net position (deficit), beginning, as restated	(5,272,753)	(497,261)	(5,770,014)
Net position (deficit), end of year	$ (5,711,648)	$ (126,944)	$ (5,838,592)

The notes to the basic financial statements are an integral part of this statement.

UNION COUNTY BOARD OF EDUCATION ***Exhibit 9***
STATEMENT OF CASH FLOWS
PROPRIETARY FUND TYPES
For the Fiscal Year Ended June 30, 2025

	Enterprise		
	Major Funds		
	School Food Service	After School Program	Totals
Cash flows from operating activities:			
Cash received from customers	$ 7,608,672	$ 3,051,165	$ 10,659,837
Cash paid for goods and services	(7,828,439)	(429,811)	(8,258,250)
Cash paid to employees for services	(11,785,340)	(2,334,130)	(14,119,470)
Net cash provided (used) by operating activities	(12,005,107)	287,224	(11,717,883)
Cash flows from noncapital financing activities:			
Due to other funds	(890,510)	-	(890,510)
Federal and State reimbursements	11,609,488	-	11,609,488
Net cash provided by noncapital activities	10,718,978	-	10,718,978
Cash flows from capital and related financing activities:			
Purchase of capital assets	(299,002)	-	(299,002)
Cash flows from investing activities:			
Interest earned on investments	177,224	12,592	189,816
Sales of investments	1,141,134	-	1,141,134
Net cash provided by investing activities	1,318,358	12,592	1,330,950
Net increase (decrease) in cash and cash equivalents	(266,773)	299,816	33,043
Cash and cash equivalents, beginning of year	6,942,671	1,824,741	8,767,412
Cash and cash equivalents, end of year	$ 6,675,898	$ 2,124,557	$ 8,800,455
Reconciliation of operating income (loss) to net cash provided (used) by operating activities:			
Operating income (loss)	$ (13,877,053)	$ 357,725	$ (13,519,328)
Adjustments to reconcile operating income (loss) to net cash provided (used) by operating activities:			
Depreciation	268,895	-	268,895
Donated commodities	1,232,161	-	1,232,161
Salaries paid by special revenue fund	62,495	-	62,495
Changes in assets and liabilities:			
Decrease in accounts receivable	41,118	25,024	66,142
Decrease in inventories	78,425	-	78,425
Increase (decrease) in accounts payable and accrued liabilities	75,166	(16,965)	58,201

The notes to the basic financial statements are an integral part of this statement.

	Enterprise		
	Major Funds		
	School Food Service	After School Program	Totals
Increase (decrease) in unearned revenue	(27,114)	5,868	(21,246)
Decrease in pension liability	(689,579)	(169,483)	(859,062)
Increase in OPEB liability	2,284,711	257,746	2,542,457
Increase in deferred outflow	(525,466)	(23,185)	(548,651)
Decrease in deferred inflow	(718,761)	(140,949)	(859,710)
Decrease in compensated absences payable	(199,900)	(7,012)	(206,912)
Total adjustments	1,871,946	(70,501)	1,801,445
Net cash provided (used) by operating activities	$ (12,005,107)	$ 287,224	$ (11,717,883)

NONCASH OPERATING AND NONCAPITAL FINANCING ACTIVITIES:
The School Food Service Fund received donated commodities with a value of $1,232,161 during the fiscal year. The receipt of these commodities is reflected as a nonoperating revenue on Exhibit 8. The consumption of these commodities is recorded as an operating expense.

The State Public School Fund paid salaries and benefits of $62,495 to personnel of the School Food Service Fund during the fiscal year. The payment is reflected as a transfer in and an operating expense on Exhibit 8.

School Food Service capital assets with a value of $62,649 were purchased by the Federal Grants Fund during the year. The value of these assets is reflected as a capital contribution on Exhibit 8.

School Food Service capital assets with a value of $299,487 were purchased by the Capital Outlay Fund during the year. The value of these assets is reflected as a capital contribution on Exhibit 8.

The notes to the basic financial statements are an integral part of this statement.

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The accounting policies of Union County Board of Education conform to generally accepted accounting principles as applicable to governments. The following is a summary of the more significant accounting policies:

A. Reporting Entity

The Union County Board of Education (Board) is a Local Education Agency empowered by State law [Chapter 115C of the North Carolina General Statutes] with the responsibility to oversee and control all activities related to public school education in Union County, North Carolina. The Board provides public school education to the children of Union County not living within the boundaries of the Kannapolis Local Educational Agency. The Board receives State, local, and federal government funding and must adhere to the legal requirements of each funding entity.

B. Basis of Presentation

Government-wide Statements: The statement of net position and the statement of activities display information about the Board. These statements include the financial activities of the overall government, except for fiduciary activities. Eliminations have been made to minimize the effect of internal activities upon revenues and expenses, however interfund services provided and used are not eliminated in the process of consolidation. These statements distinguish between the *governmental* and *business-type activities* of the Board. Governmental activities generally are financed through intergovernmental revenues and other non-exchange transactions. Business-type activities are financed in whole or in part by fees charged to external parties.

The statement of activities presents a comparison between direct expenses and program revenues for the different business-type activities of the Board and for each function of the Board's governmental activities. Direct expenses are those that are specifically associated with a program or function and, therefore, are clearly identifiable to a particular function. Indirect expense allocations that have been made in the funds have been reversed for the statement of activities. Program revenues include (a) fees and charges paid by the recipients of goods or services offered by the programs and (b) grants and contributions that are restricted to meeting the operational or capital requirements of a particular program. Revenues that are not classified as program revenues are presented as general revenues.

Fund Financial Statements: The fund financial statements provide information about the Board's funds. Separate statements for each fund category – *governmental and proprietary* – are presented. The emphasis of fund financial statements is on major governmental and enterprise funds, each displayed in a separate column. All remaining governmental and enterprise funds are aggregated and reported as nonmajor funds.

Proprietary fund operating revenues, such as charges for services, result from exchange transactions associated with the principal activity of the fund. Exchange transactions are those in which each party receives and gives up essentially equal values. Nonoperating revenues, such as subsidies and investment earnings, result from nonexchange transactions or ancillary activities. All expenses are considered to be operating expenses.

The Board reports the following major governmental funds:

General Fund. The General Fund is the general operating fund of the Board. The General Fund accounts for all financial resources except those that are accounted for in another fund.

State Public School Fund. The State Public School Fund includes appropriations from the Department of Public Instruction for the current operating expenditures of the public school system.

Federal Grants Fund. The Federal Grants Fund includes appropriations from the U.S. Government for the current operating expenditures of the public school system.

Other Special Revenue Fund. The Other Special Revenue Fund is used to account for revenues from reimbursements (including indirect costs), fees for actual costs, tuition, sales tax refunds, gifts and grants restricted as to use, trust funds, federal grants restricted as to use, federal appropriations made directly to local school administrative units, funds received from prekindergarten programs and other special programs.

Individual Schools Fund. The Individual Schools Fund includes revenues and expenditures of the activity funds of the individual schools. The primary revenue sources include funds held on the behalf of various clubs and organizations, receipts from athletic events, and proceeds from various fund raising activities. The primary expenditures are for athletic teams, club programs, activity buses, and instructional needs.

Capital Outlay Fund. The Capital Outlay Fund accounts for financial resources to be used for the acquisition and construction of major capital facilities (other than those financed by proprietary funds and trust funds). It is mandated by State law [G.S.115C-426]. Capital projects are funded by Union County appropriations, restricted sales tax moneys, proceeds of Union County bonds issued for public school construction as well as certain State assistance.

The Board reports the following major enterprise funds:

School Food Service Fund. The School Food Service Fund is used to account for the food service program within the school system.

After School Program Fund. The After School Program Fund is used to account for the before and after school child care program within the school system.

C. Measurement Focus and Basis of Accounting

Government-wide and Proprietary Fund Financial Statements. The government-wide and proprietary fund financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded at the time liabilities are incurred, regardless of when the related cash flows take place. Non-exchange transactions, in which the Board gives (or receives) value without directly receiving (or giving) equal value in exchange, include grants and donations. Revenue from grants and donations is recognized in the fiscal year in which all eligibility requirements have been satisfied.

Governmental Fund Financial Statements. Governmental funds are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Under this method, revenues are recognized when measurable and available. The Board considers all revenues reported in the governmental funds to be available if the revenues are collected within sixty days after year-end. These could include federal, State, and county grants, and some charges for services. Expenditures are recorded when the related fund liability is incurred, except for claims and judgments and compensated absences which are recognized as expenditures to the extent they have matured. General capital asset acquisitions are reported as expenditures in governmental funds. Acquisitions under leases qualifying as other than short-term are reported as other financing sources.

Under the terms of grant agreements, the Board funds certain programs by a combination of specific cost-reimbursement grants and general revenues. Thus, when program expenses are incurred, there is both restricted and unrestricted net position available to finance the program. It is the Board's policy to first apply cost-reimbursement grant resources to such programs and then general revenues.

All governmental and business-type activities and enterprise funds of the Board follow FASB Statements and Interpretations issued on or before November 30, 1989, Accounting Principles Board Opinions, and Accounting Research Bulletins, unless those pronouncements conflict with GASB pronouncements.

D. Budgetary Data

The Board's budgets are adopted as required by the North Carolina General Statutes. Annual budgets are adopted for all funds, except for the individual schools special revenue funds as required by the North Carolina General Statutes. No budget is required by State law for individual school funds. All appropriations lapse at the fiscal year-end. All budgets are prepared using the modified accrual basis of accounting. Expenditures may not legally exceed appropriations at the functional level for all annually budgeted funds. The Board has authorized the Superintendent to move moneys (up to $100,000) from one function to another within a fund. Amendments are required for any revisions that alter total expenditures of any fund or that change functional appropriations by more than $100,000. All amendments must be approved by the governing board. During the year, several amendments to the original budget were necessary. The budget ordinance must be adopted by July 1 of the fiscal year or the governing board must adopt an interim budget that covers that time until the annual ordinance can be adopted.

E. Assets, Deferred Outflows, Liabilities, Deferred Inflows and Fund Equity

1. Deposits and Investments

All deposits of the Board are made in board-designated official depositories and are secured as required by State law [G.S. 115C-444]. The Board may designate, as an official depository, any bank or savings association whose principal office is located in North Carolina. Also, the Board may establish time deposit accounts such as NOW and SuperNOW accounts, money market accounts, and certificates of deposit. The Board also has money credited in its name with the State Treasurer and may issue State warrants against these funds.

State law [G.S. 115C-443] authorizes the Board to invest in obligations of the United States or obligations fully guaranteed both as to principal and interest by the United States; obligations of the State of North Carolina; bonds and notes of any North Carolina local government or public authority; obligations of certain non-guaranteed federal agencies; certain high quality issues of commercial paper and bankers' acceptances; the North Carolina Capital Management Trust (NCCMT), an SEC-registered (2a-7) money market mutual fund; and the North Carolina State Treasurer's Short Term Investment Fund (STIF). The STIF is managed by the staff of the Department of State Treasurer and operated in accordance with State laws and regulations. It is not registered with the SEC. The STIF consists of an internal portion and an external portion in which the Board participates. Investments are restricted to those enumerated in G.S. 147-69.1.

The Board's investments are reported at amortized cost or at fair value determined by either quoted market prices or a matrix pricing model. The NCCMT Government Portfolio's securities are measured at fair value. The STIF securities (as valued under level 2 of the fair value hierarchy) are reported at cost and maintain a constant $1 per share value. Investments valued under level 2 of the fair value hierarchy are valued using prices that are either directly or indirectly observable for an asset or liability. Under the authority of G.S. 147-69.3, no unrealized gains or losses of the STIF are distributed to external participants of the fund.

2. Cash and Cash Equivalents

The Board pools money from several funds to facilitate disbursement and investment and to maximize investment income. Therefore, all cash and investments are essentially demand deposits and are considered cash and cash equivalents.

3. Inventories

The inventories of the Board are valued at cost and the Board uses the first-in, first-out (FIFO) flow assumption in determining cost. Proprietary Fund inventories consist of food and supplies and are recorded as expenses when consumed.

4. Capital Assets

Donated assets received prior to June 30, 2015 are recorded at their estimated fair value at the date of donation or forfeiture. Donated capital assets received after June 30, 2015 are recorded at acquisition value. All other capital assets are recorded at original cost. Improvements are capitalized and depreciated over the remaining useful lives of the related capital assets. Certain items acquired before July 1, 1995 are recorded at an estimated original historical cost. The total of these estimates is not considered large enough that any errors would be material when capital assets are considered as a whole.

It is the policy of the Board to capitalize all capital assets costing more than $5,000 with an estimated useful life of two or more years. The cost of normal maintenance and repairs that do not add to the value of the asset or materially extend asset lives are not capitalized.

Union County holds title to certain properties, which are reflected as capital assets in the financial statements of the Board. The properties have been deeded to the County to permit installment purchase financing of acquisition and construction costs and to permit the County to receive refunds of sales tax paid for construction costs. Agreements between the County and the Board gives the schools full use of the facilities, full responsibility for maintenance of the facilities, and provides that the County will convey title of the property back to the Board, once all restrictions of the financing agreements and all sales tax reimbursement requirements have been met.

Capital assets are depreciated using the straight-line method over the following estimated useful lives:

	Years
Buildings	20 – 50
Equipment and furniture	5 – 10
Vehicles	6 – 20
Computer equipment	3 – 5

Depreciation for equipment serves multiple purposes and cannot be allocated ratably, therefore it is reported as “unallocated depreciation” on the Statement of Activities. Land and construction in progress are not depreciated.

5. Deferred outflows and inflows of resources

In addition to assets, the statement of financial position will sometimes report a separate section for deferred outflow of resources. This separate financial statement element, deferred outflows of resources, represents a consumption of net assets that applies to a future period and so will not be recognized as an expense or expenditure until then. The Board has two items that meet this criterion - a pension related deferral and contributions made to the pension plan in the current fiscal year. The statement of financial position also reports a separate section for deferred inflows of resources. This separate financial statement element, deferred inflows of resources, represents an acquisition of net assets that applies to a future period and so will not be recognized as revenue until then. The Board has one item that meet this criterion – pension related deferrals.

6. Long-term Obligations

In the government-wide financial statements, long-term debt and other long-term obligations are reported as liabilities in the applicable governmental activities.

7. Compensated Absences

The Board recognizes a liability for compensated absences for leave time that (1) has been earned for services previously rendered by employees, (2) accumulates and is allowed to be carried over to subsequent years, and (3) is more likely than not to be used as time off or settled (for example, paid in cash to the employee) during or upon separation from employment. Based on the criteria listed, two types of leave qualify for liability recognition for compensated absences – vacation and sick leave. The Board follows the State's policy for vacation and sick leave. The liability for compensated absences is reported as incurred in the government-wide and proprietary fund financial statements on a FIFO basis. A liability for compensated absences is recorded in the governmental funds only if the liability has matured because of employee resignations or retirements. The liability for compensated absences includes salary-related benefits, where applicable. An estimate has been made based on prior years' records of the current portion of compensated absences.

Vacation Leave - Employees may accumulate up to thirty (30) days of earned but unused vacation leave with such leave being fully vested when earned and eligible for payment at the employee's current pay rate upon separation from employment.

Sick Leave - The sick leave policy of the Board provides for an unlimited accumulation of earned sick leave. Sick leave does not vest, but any unused sick leave accumulated at the time of retirement may be used in the determination of length of service for retirement benefit purposes. However, a liability for the estimated value of sick leave that will be used by employees as time off is included in the liability for compensated absences.

8. Net Position/Fund Balances

Net Position
Net position in the government-wide and proprietary fund financial statements is classified as net investment in capital assets; restricted; and unrestricted. Restricted net position represents constraints on resources that are either externally imposed by creditors, grantors, contributors, or the laws or regulations of other governments, or imposed by law through State statute.

Fund Balances
In the governmental fund financial statements, fund balance is composed of four classifications designed to disclose the hierarchy of constraints placed on how fund balance can be spent.

The governmental fund types classify fund balances as follows:

Restricted fund balance – This classification includes amounts that are restricted to specific purposes externally imposed by creditors or imposed by law.

Restricted for Stabilization by State statute – North Carolina G.S. 115C-425(a) prohibits boards of education from budgeting or spending a portion of their fund balance. Restricted by State statute (RSS) is calculated at the end of each fiscal year. The amount of fund balance not available for appropriation is what is known as "restricted by State statute". Appropriated fund balance in any fund shall not exceed the sum of cash and investments minus the sum of liabilities, encumbrances, and deferred revenues arising from cash receipts, as those figures stand at the close of the fiscal year next preceding the budget year. Outstanding encumbrances are included within RSS.

Restricted for School Capital Outlay - portion of fund balance that can only be used for school capital outlay. [G.S. 159-18 through 22]

Restricted for special revenue programs– grant and other revenues restricted for expenditure for various instructional services, as allowable by the funding source.

Restricted for Individual Schools – revenue sources restricted for expenditures for the various clubs and organizations, athletic events, and various fund raising activities for which they were collected.

Assigned fund balance – portion of fund balance that the Board of Education intends to use for specific purposes. Any amounts assigned are established by the Board's Budget Committee.

Subsequent year's expenditures – portion of fund balance that is appropriated in the next year's budget that is not already classified in restricted fund balance. The Board of Education approves the appropriation.

Special revenue programs – portion of fund balance that represents the residual amount of revenues from certain grants, reimbursements, indirect costs and other financial resources in excess of related expenditures that the Board of Education has assigned to be expended for educational services. These amounts can be expended for instructional services, system-wide support services, ancillary services or non-programmed charges.

Unassigned fund balance – the portion of fund balance that has not been restricted, committed, or assigned to specific purposes or other funds. The General fund is the only fund that reports a positive unassigned fund balance amount, a negative unassigned fund balance may be reported in other governmental funds, if expenditures incurred for specific purposes exceeded the amounts restricted, committed or assigned to those purposes.

The Board of Education has a management policy for revenue spending that provides guidance for programs with multiple revenue sources. The Finance Officer will use resources in the following hierarchy: bond proceeds, federal funds, State funds, local non-board of education funds, and lastly board of education funds. For purposes of fund balance classification, expenditures are to be spent from restricted fund balance first, followed in-order by committed fund balance, assigned fund balance and lastly unassigned fund balance. The Finance Officer has the authority to deviate from this policy if it is in the best interest of the Board of Education.

9. Reconciliation of District-wide and Fund Financial Statements

a. Explanation of certain differences between the governmental fund balance sheet and the government-wide statement of net position

The governmental fund balance sheet includes a reconciliation between *fund balance - total governmental funds* and *net position – governmental activities* as reported in the government-wide statement of net position. The net adjustment of $118,612,502 consists of several elements as follows:

Description	Amount
Capital assets used in governmental activities are not financial resources and are therefore not reported in the funds (total capital assets at historical cost on government-wide statement in governmental activities column)	$ 1,091,307,266
Less Accumulated Depreciation	(382,480,478)
Net capital assets	708,826,788
Net OPEB Asset	405,304
Pension related deferred outflows of resources	98,147,105
OPEB related deferred outflows of resources	129,524,772
Liabilities that, because they are not due and payable in the current period, do not require current resources to pay and are therefore not recorded in the fund statements:	
Installment financing	(13,547,730)
Compensated absences	(89,948,661)
Net pension liability	(211,314,285)
Net OPEB liability	(414,200,375)
Deferred inflows of resources related to pensions	(7,250,526)
Deferred inflows of resources related to OPEB	(82,029,890)
Total adjustment	$ 118,612,502

b. Explanation of certain differences between the governmental fund statement of revenues, expenditures, and changes in fund balances and the district-wide statement of activities

The governmental fund statement of revenues, expenditures, and changes in fund balances includes a reconciliation between *net changes in fund balances - total governmental funds* and *changes in net position of governmental activities* as reported in the government-wide statement of activities. There are several elements of that total adjustment of $54,978,930 as follows:

Description	Amount
Capital outlay expenditures recorded in the fund statements but capitalized as assets in the statement of activities	$ 69,669,846
Depreciation expense, the allocation of those assets over their useful lives, that is recorded on the statement of activities but not in the fund statements	(22,157,982)
New debt issued during the year is recorded as a source of funds on the fund statements; it has no effect on the statement of activities - it affects only the government-wide statement of net position	(4,944,060)
Principal payments on debt owed are recorded as a use of funds on the fund statements but affect only the statement of net position on the government-wide statements	4,470,920
Contributions to the pension plan in the current fiscal year are not included on the Statement of Activities	43,121,028
Contributions to the OPEB plans in the current fiscal year are not included on the Statement of Activities	18,285,986
Proceeds from the sale of capital assets are recorded as revenues in the fund statements but not in the statement of activities.	(29,633)
Revenues in the statement of activities that do not provide current financial resources are not reported as revenues in the funds.	
OPEB nonemployer contributions	126,015
Gain on disposal of capital assets	16,250
Expenses reported in the Statement of Activities that do not require the use of current resources to pay are not recorded as expenditures in the fund statements	
Pension (expense) benefit	(52,524,928)
OPEB (expense) benefit	(2,893,464)
Compensated absences are accrued in the government-wide statements but not in the fund statements because they do not use current resources	1,838,952
Total adjustment	$ 54,978,930

10. Defined Benefit Pension Plan and OPEB Plans

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Teachers' and State Employees' Retirement System (TSERS), the Retiree Health Benefit Fund (RHBF), and the Disability Income Plan of NC (DIPNC) and additions to/deductions from TSERS, RHBF, and DIPNC's fiduciary net position have been determined on the same basis as they are reported by TSERS, RHBF, and DIPNC. For this purpose, plan member contributions are recognized in the period in which the contributions are due. The Board's employer contributions are recognized when due and the Board has a legal requirement to provide the contributions. Benefits and refunds are recognized when due and payable in accordance with the terms of TSERS, RHBF, and DIPNC. Investments are reported at fair value.

NOTE 2 - DETAIL NOTES ON ALL FUNDS

A. Assets

1. Deposits

All of the Board's deposits are either insured or collateralized by using one of two methods. Under the Dedicated Method, all deposits exceeding the federal depository insurance coverage level are collateralized with securities held by the Board's agents in the unit's name. Under the Pooling Method, which is a collateral pool, all uninsured deposits are collateralized with securities held by the State Treasurer's agent in the name of the State Treasurer. Since the State Treasurer is acting in a fiduciary capacity for the Board, these deposits are considered to be held by the agent in the entity's name. The amount of the pledged collateral is based on an approved averaging method for non-interest bearing deposits and the actual current balance for interest-bearing deposits. Depositories using the Pooling Method report to the State Treasurer the adequacy of their pooled collateral covering uninsured deposits. The State Treasurer does not confirm this information with the Board or with the escrow agent. Because of the inability to measure the exact amount of collateral pledged for the Board under the Pooling Method, the potential exists for under-collateralization, and this risk may increase in periods of high cash flows. However, the State Treasurer of North Carolina enforces strict standards of financial stability for each depository that collateralizes public deposits under the Pooling Method. The Board has no policy regarding custodial credit risk for deposits.

At June 30, 2025, the Board had deposits with banks and savings and loans with a carrying amount of $8,469,562 and deposits with the State Treasurer with a carrying amount of $-0-. The bank balances with the financial institutions and the State Treasurer were $18,068,378 and $1,000,003, respectively. Of these balances, $5,537,187 was covered by federal depository insurance and $13,531,194 was covered by collateral held by authorized escrow agents in the name of the State Treasurer.

2. Investments

At June 30, 2025, the Board of Education had $5,827,558 invested in US Treasury Notes. The Board also had $21,894,324 invested with the North Carolina Capital Management Trust's Cash Portfolio which carried a credit rating of AAAm by Standard and Poor's. In addition, the Board has $2,137,686 invested with the State Treasurer in the Short Term Investment Fund (STIF). The STIF is classified in Level 2 of the fair value hierarchy and valued using prices that are either directly or indirectly observable for an asset or liability.

At June 30, 2025, the Board had the following investments and maturities:

Investment Type	Rating	Valuation Measurement Method	Fair Value	Less Than 6 Months	6-12 Months	1-3 Years
U.S. Treasuries	AAA	Fair Value - Level 1	$ 5,827,558	$ 1,202,426	$ 1,288,400	$ 3,336,732

All investments are measured using the market approach: using prices and other relevant information generated by market transactions involving identical or comparable assets or a group of assets.

Level of fair value hierarchy: Level 1: Debt securities valued using directly observable, quoted prices (unadjusted) in active markets for identical assets. Level Two: Debt securities are valued using a matrix pricing technique. Matrix pricing is used to value securities based on the securities' relationship to benchmark quoted prices.

Interest Rate Risk

The Board of Education does not have a formal investment policy that limits investment maturities as a means of managing its exposure to fair value losses arising from increasing interest rates. The Department of State Treasurer Short Term Investment Fund (STIF) is unrated and has a weighted average maturity of 2.1 years as of June 30, 2025.

Concentration of Credit Risk

The Board places no limit on the amount the Board may invest in any one issuer. The Board does not have any investments, other than US Treasuries, that account for more than 5% of total invested funds.

3. Accounts Receivable

Receivables at the district-wide level at June 30, 2025 are as follows:

	Due from other governments	Other	Total
Governmental activities:			
General Fund	$ 122,718	$ 53,978	$ 176,696
Other governmental activities	9,539,958	108,398	9,648,356
Total governmental activities	$ 9,662,676	$ 162,376	$ 9,825,052
Business-type activities:			
School Food Service	$ 294,113	$ 308,289	$ 602,402
After School Program	-	10,705	10,705
Total business-type activities	$ 294,113	$ 318,994	$ 613,107

Due from other governments consists of the following:

Governmental activities:		
General Fund	$ 122,718	Due from Cities and County
Other Special Revenue Fund	64,330	Due from State & Federal governments
Capital Outlay Fund	9,475,628	Due from County
Total	$ 9,662,676	
Business-type activities:		
School Food Service Fund	$ 294,113	Federal grant funds

4. Capital Assets

Capital asset activity for the year ended June 30, 2025 was as follows:

	Beginning Balances	Increases	Decreases	Ending Balances
Governmental activities:				
Capital assets not being depreciated:				
Land	$ 64,242,660	$ -	$ -	$ 64,242,660
Construction in progress	68,650,586	66,974,593	8,696,923	126,928,256
Total capital assets not being depreciated	132,893,246	66,974,593	8,696,923	191,170,916
Capital assets being depreciated:				
Buildings and improvements	813,970,352	7,102,719	-	821,073,071
Equipment and furniture	30,618,479	1,997,088	40,165	32,575,402
Vehicles	45,253,839	2,292,369	1,058,331	46,487,877
Total capital assets being depreciated	889,842,670	11,392,176	1,098,496	900,136,350
Less accumulated depreciation for:				
Buildings and improvements	301,017,197	19,464,007	-	320,481,204
Equipment and furniture	27,042,995	559,126	32,690	27,569,431
Vehicles	33,347,417	2,134,849	1,052,423	34,429,843
Total accumulated depreciation	361,407,609	22,157,982	1,085,113	382,480,478
Total capital assets being depreciated, net	528,435,061			517,655,872
Governmental activity capital assets, net	$ 661,328,307			$ 708,826,788

	Beginning Balances	Increases	Decreases	Ending Balances
Business-type activities:				
School Food Service Fund:				
Capital assets being depreciated:				
Equipment, furniture and vehicles	$ 7,113,163	$ 661,138	$ 37,692	$ 7,736,609
Less accumulated depreciation for:				
Equipment, furniture and vehicles	5,956,856	268,895	37,692	6,188,059
School Food Service capital assets, net	1,156,307			1,548,550
Child Care Fund:				
Capital assets being depreciated:				
Equipment and furniture	110,550	-	-	110,550
Less accumulated depreciation for:				
Equipment and furniture	110,550	-	-	110,550
Child Care Fund capital assets, net	-			-
Business-type activities capital assets, net	$ 1,156,307			$ 1,548,550

Depreciation was charged to governmental functions as follows:

Regular instructional services	$ 19,464,007
System-wide support services	2,134,849
Unallocated depreciation	559,126
Total	$ 22,157,982

5. Construction Commitments

As of June 30, 2025, the Board has various construction, renovation and repair projects in progress at several schools in the district. At year end, the Board's commitments with contractors for the remaining portion of the contracts to complete these projects totaled approximately $20.0 million.

B. Liabilities

1. Pension Plan and Other Postemployment Obligations

a. Teachers' and State Employees' Retirement System

Plan Description. The Board is a participating employer in the statewide Teachers' and State Employees' Retirement System (TSERS), a cost-sharing multiple-employer defined benefit pension plan administered by the State of North Carolina. TSERS membership is comprised of employees of the State (state agencies and institutions), universities, community colleges, and certain proprietary component units along with the employees of Local Education Agencies and charter schools. Article 1 of G.S. Chapter 135 assigns the authority to establish and amend benefit provisions to the North Carolina General Assembly. Management of the plan is vested in the TSERS Board of Trustees, which consists of 13 members – nine appointed by the Governor, one appointed by the state Senate, one appointed by the state House of Representatives, and the State Treasurer and State Superintendent, who serve as ex-officio members. The Teachers' and State Employees' Retirement System is included in the Annual

Comprehensive Financial Report (ACFR) for the State of North Carolina. The State's ACFR includes financial statements and required supplementary information for TSERS. That report may be obtained by writing to the Office of the State Controller, 1410 Mail Service Center, Raleigh, North Carolina 27699-1410, by calling (919) 981-5454, or at www.osc.nc.gov.

Benefits Provided. TSERS provides retirement and survivor benefits. Retirement benefits are determined as 1.82% of the member's average final compensation times the member's years of creditable service. A member's average final compensation is calculated as the average of a member's four highest consecutive years of compensation. General employee plan members are eligible to retire with full retirement benefits at age 65 with five years of creditable service, at age 60 with 25 years of creditable service, or at any age with 30 years of creditable service. General employee plan members are eligible to retire with partial retirement benefits at age 50 with 20 years of creditable service or at age 60 with five years of creditable service. Survivor benefits are available to eligible beneficiaries of members who die while in active service or within 180 days of their last day of service and who have either completed 20 years of creditable service regardless of age or have completed five years of service and have reached age 60. Eligible beneficiaries may elect to receive a monthly Survivor's Alternate Benefit for life or a return of the member's contributions. The plan does not provide for automatic post-retirement benefit increases. Increases are contingent upon actuarial gains of the plan.

TSERS plan members who are LEOs are eligible to retire with full retirement benefits at age 55 with five years of creditable service as an officer, or at any age with 30 years of creditable service. LEO plan members are eligible to retire with partial retirement benefits at age 50 with 15 years of creditable service as an officer. Survivor benefits are available to eligible beneficiaries of LEO members who die while in active service or within 180 days of their last day of service and who also have either completed 20 years of creditable service regardless of age, or have completed 15 years of service as a LEO and have reached age 50, or have completed five years of creditable service as a LEO and have reached age 55, or have completed 15 years of creditable service as a LEO if killed in the line of duty. Eligible beneficiaries may elect to receive a monthly Survivor's Alternate Benefit for life or a return of the member's contributions.

Contributions. Contribution provisions are established by General Statute 135-8 and may be amended only by the North Carolina General Assembly. Board employees are required to contribute 6% of their compensation. Employer contributions are actuarially determined and set annually by the TSERS Board of Trustees. The Board's contractually required contribution rate for the year ended June 30, 2025 was 16.79% of covered payroll, actuarially determined as an amount that, when combined with employee contributions, is expected to finance the costs of benefits earned by employees during the year. Contributions to the pension plan from the Board were $44,371,186 for the year ended June 30, 2025.

Refunds of Contributions – Board employees who have terminated service as a contributing member of TSERS, may file an application for a refund of their contributions. By state law, refunds to members include 4% interest. State law requires a 60-day waiting period after service termination before the refund may be paid. The acceptance of a refund payment cancels the individual's right to employer contributions or any other benefit provided by TSERS.

At June 30, 2025, the Board reported a liability of $217,440,676 for its proportionate share of the net pension liability. The net pension liability was measured as of June 30, 2024. The total pension liability used to calculate the net pension asset was determined by an actuarial valuation as of December 31, 2023. The total pension liability was then rolled forward to the measurement date of June 30, 2024 utilizing update procedures incorporating the actuarial assumptions. The Board's proportion of the net pension liability was based on a projection of the Board's long-term share of future payroll covered by the pension plan, relative to the projected future payroll covered by the pension plan of all participating TSERS employers, actuarially determined. At June 30, 2024 and 2023, the Board's proportion was 1.46754 % and 1.53309%, respectively.

For the year ended June 30, 2025, the Board recognized pension expense of $54,146,960. At June 30, 2025, the Board reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	$ 19,595,181	$ 642,783
Changes of assumptions	-	-
Net difference between projected and actual earnings on pension plan investments	35,854,937	-
Changes in proportion and differences between Board contributions and proportionate share of contributions	1,171,267	6,817,949
Board contributions subsequent to the measurement date	44,371,186	-
Total	$ 100,992,571	$ 7,460,732

$44,371,186 reported as deferred outflows of resources related to pensions resulting from Board contributions subsequent to the measurement date will be recognized as a decrease of the net pension liability in the year ended June 30, 2026. Other amounts reported as deferred outflows of resources related to pensions will be recognized in pension expense as follows:

Year ended June 30:	
2026	$ 14,170,579
2027	39,755,369
2028	(927,280)
2029	(3,838,015)
2030	-
Thereafter	-
Total	$ 49,160,653

Actuarial Assumptions. The total pension liability in the December 31, 2023 actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	2.50 percent
Salary increases	3.25 to 8.05 percent, including inflation and productivity factor
Investment rate of return	6.50 percent, net of pension plan investment expense, including inflation

The plan currently uses mortality tables that vary by age, gender, employee group (i.e. general, law enforcement officer) and health status (i.e. disabled and healthy). The current mortality rates are based on published tables and based on studies that cover significant portions of the U.S. population. The healthy mortality rates also contain a provision to reflect future mortality improvements.

The actuarial assumptions used in the December 31, 2023 valuation were based on the results of an actuarial experience study prepared as of December 31, 2019 and adopted by the Board of Trustees on January 28, 2021.

Future ad hoc COLA amounts are not considered to be substantively automatic and are therefore not included in the measurement.

The projected long-term investment returns and inflation assumptions are developed through review of current and historical capital markets data, sell-side investment research, consultant whitepapers, and historical performance of investment strategies. Fixed income return projections reflect current yields across the U.S. Treasury yield curve and market expectations of forward yields projected and interpolated for multiple tenors and over multiple year horizons. Global public equity return projections are established through analysis of the equity risk premium and the fixed income return projections. Other asset categories and strategies' return projections reflect the foregoing and historical data analysis. These projections are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation. The target allocation and best estimates of arithmetic real rates of return for each major asset class as of June 30, 2024 are summarized in the following table:

Asset Class	Target Allocation	Long-Term Expected Real Rate of Return
Fixed Income	33.0%	0.9%
Global Equity	38.0%	6.5%
Real Estate	8.0%	5.9%
Alternatives	8.0%	8.2%
Credit	7.0%	5.0%
Inflation Protection	6.0%	2.7%
Total	100%	

The information above is based on 30-year expectations developed with the consulting actuary for the 2022 asset liability and investment policy study for the North Carolina Retirement Systems, including TSERS. The long-term nominal rates of return underlying the real rates of return are arithmetic annualized figures. The real rates of return are calculated from nominal rates by multiplicatively subtracting a long-term inflation assumption of 3.00%. All rates of return and inflation are annualized.

Discount rate. The discount rates used to measure the total pension liability reported at June 30, 2025 and 2024 was 6.50% for both years. The projection of cash flows used to determine the discount rate assumed that contributions from plan members will be made at the current contribution rate and that contributions from employers will be made at statutorily required rates, actuarially determined. Based on these assumptions, the pension plan's fiduciary net position was projected to be available to make all projected future benefit payments of the current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity of the Board's proportionate share of the net pension liability to changes in the discount rate. The following presents the Board's proportionate share of the net pension liability calculated using the discount rate of 6.50 percent, as well as what the Board's proportionate share of the net pension asset or net pension liability would be if it were calculated using a discount rate that is 1-percentage-point lower (5.50 percent) or 1-percentage-point higher (7.50 percent) than the current rate:

	1% Decrease (5.50%)	Discount Rate (6.50%)	1% Increase (7.50%)
Board's proportionate share of the net pension liability	$ 398,870,811	$ 217,440,676	$ 67,824,944

Pension plan fiduciary net position. Detailed information about the pension plan's fiduciary net position is available in the separately issued Annual Comprehensive Financial Report (ACFR) for the State of North Carolina.

b. Other Postemployment Benefits

1. Healthcare Benefits

Plan description. The Retiree Health Benefit Fund (RHBF) has been established as a fund to provide health benefits to retired and disabled employees and their applicable beneficiaries. RHBF is established in Chapter 135, Article 1 of the General Statutes. It is a cost-sharing, multiple-employer, defined benefit healthcare plan, exclusively for the benefit of former employees of the State, the University of North Carolina System, and community colleges. In addition, LEAs, charter schools, and some select local governments also participate.

Management of the plan is vested in the State Health Plan Board of Trustees, which consists of 13 members – eight appointed by the Governor, one appointed by the State Senate, one appointed by the State House of Representatives, and the State Treasurer the State Superintendent and the Director of the Office of State Human Resources who serve as ex-officio members. RHBF is supported by a percent of payroll contribution from participating employing units. Each year the percentage is set in legislation, as are the maximum per retiree contributions from RHBF to the State Health Plan. The State Treasurer, with the approval of the State Health Plan Board of Trustees, then sets the employer contributions (subject to the legislative cap) and the premiums to be paid by retirees, as well as the health benefits to be provided through the State Health Plan.

The financial statements and other required disclosures for the plan are presented in the State of North Carolina's ACFR, which can be found at https://www.osc.nc.gov/public-information/reports.

Benefits provided. Plan benefits received by retired employees and disabled employees from RHBF are OPEB. The healthcare benefits for retired and disabled employees who are not eligible for Medicare are the same as for active employees. The plan options change when former employees become eligible for Medicare. Medicare retirees have the option of selecting one of two fully-insured Medicare Advantage/Prescription Drug Plan (MA-PDP) options of the self-funded Traditional 70/30 preferred Provider Organization plan option that is also offered to non-Medicare members. If the Traditional 70/30 Plan is selected by a Medicare retiree, the self-funded State Health Plan coverage is secondary to Medicare.

Those former employees who are eligible to receive medical benefits from RHBF are long-term disability beneficiaries of the Disability Income Plan of North Carolina (DIPNC) and retirees of the TSERS, the Consolidated Judicial Retirement System (CJRS), the Legislative Retirement System (LRS), the University Employees' Optional Retirement Program (ORP), and a small number of local governments, with five or more years of contributory membership service in their retirement system prior to disability or retirement, with the following exceptions: for employees first hired on or after October 1, 2006, and members of the General Assembly first taking office on or after February 1, 2007, future coverage as retired employees and retired members of the General Assembly is subject to the requirement that the future retiree have 20 or more years of retirement service credit in order to receive coverage on a noncontributory basis. Employees first hired on or after October 1, 2006 and members of the General Assembly first taking office on or after February 1, 2007 with 10 but less than 20 years of retirement service credit are eligible for coverage on a partially contributory basis. For such future retirees, the State will pay 50% of the State Health Plan's noncontributory premium.

Section 35.21 (c) and (d) of Session Law 2017-57 repeals retiree medical benefits for employees first hired January 1, 2021. The new legislation amends Article 3B of Chapter 135 of the General Statutes to require that retirees must earn contributory retirement service in TSERS (or in an allowed local system unit), CJRS, or LRS prior to January 1, 2021, and not withdraw that service, in order to be eligible for retiree medical benefits under the amended law. Consequently, members first hired on and after January 1, 2021 will not be eligible to receive retiree medical benefits.

RHBF's benefit and contribution provisions are established by Chapter 135, Article 1 and Chapter 135, Article 3B of the General Statutes and may be amended only by the North Carolina General Assembly. RHBF does not provide for automatic post-retirement benefit increases.

Contributions. By General Statute, accumulated contributions from employers to RHBF and any earnings on those contributions shall be used to provide health benefits to retired and disabled employees and their applicable beneficiaries. By statute, contributions to RHBF are irrevocable. Also, by law, fund assets are dedicated to providing benefits to retired and disabled employees and their applicable beneficiaries and are not subject to the claims of creditors of the employers making contributions to RHBF. However, RHBF assets may be used for reasonable expenses to administer the RHBF, including costs to conduct required actuarial valuations of state—supported retired employees' health benefits. Contribution rates to RHBF, which are intended to finance benefits and administrative expenses on a pay-as-you-go basis are determined by the General Assembly in the Appropriations Bill. For the year ended June 30, 2025, the Board contributed 6.99% of covered payroll, which amounted to $18,472,578 for the entire fiscal year. During the current fiscal year, the plan also recognized a one-time transfer of excess funding from the Public Employees Health Benefits Fund totaling $10.3 million, which was isolated from the OPEB expense and allocated to participating employers as a separate revenue item. The Board's proportionate share of this allocation totaled $129,668.

At June 30, 2025, the Board reported a liability of $426,208,809 for its proportionate share of the net RHBF OPEB liability. The net OPEB liability was measured as of June 30, 2024, and the total OPEB liability used to calculate the net OPEB liability was determined by an actuarial valuation as of December 31, 2023. The total OPEB liability was then rolled forward to the measurement date of June 30, 2024 utilizing update procedures incorporating the actuarial assumptions. The Board's proportion of the net OPEB liability was based on a projection of the Board's present value of future salary, actuarially determined. At June 30, 2024 and 2023, the Board's proportion was 1.25309% and 1.29846%, respectively.

$18,472,578 reported as deferred outflows of resources related to OPEB resulting from Board contributions subsequent to the measurement date will be recognized as a decrease of the net OPEB liability in the year ending June 30, 2026. Other amounts reported as deferred inflows of resources related to OPEB will be recognized in OPEB expense as follows:

Year ended June 30:	
2026	$ (10,170,564)
2027	1,566,832
2028	21,559,691
2029	17,266,810
2030	-
Thereafter	-
Total	$ 30,222,769

Actuarial assumptions. Common actuarial assumptions for both OPEB plans follow individual note disclosures for each OPEB plan.

Inflation	2.50%
Salary increases	3.25-8.05%, include 3.25% inflation and productivity factor
Investment rate of return	6.50%
Healthcare cost trend rates:	
Medical	5.00-6.50%
Prescription drug	5.00-10.00%
Administrative costs	3.00%
Post-retirement mortality rates	Pub-2010 Healthy Annuitant Mortality Table for males and females, adjusted for classification for some Participants, further adjusted with scaling factors varying by participant group, and projected for mortality improvement using Scale MP-2019

Discount rate. The discount rates used to measure the total OPEB liability for the RHBF at June 30, 2025 and 2024 were 3.93% and 3.65%, respectively. The projection of cash flow used to determine the discount rate assumed that contributions from employers would be made at the current statutorily determined contribution rate. Based on the above assumptions, the plan's fiduciary net position was not projected to be available to make projected future benefit payments of current plan members. As a result, a municipal bond rate of 3.93% was used as the discount rate used to measure the total OPEB liability. The 3.93% rate is based on the Bond Buyer 20-year General Obligation Index as of June 30, 2024.

Sensitivity of the Board's proportionate share of the net OPEB liability to changes in the discount rate. The following presents the Board's proportionate share of the net OPEB liability, as well as what the District's proportionate share of the net OPEB liability would be if it were calculated using a discount rate that is 1-percentage point lower (2.93 percent) or 1-percentage point higher (4.93 percent) than the current discount rate:

	1% Decrease (2.93%)	Discount Rate (3.93%)	1% Increase (4.93%)
Net OPEB liability	$ 507,078,178	$ 426,208,809	$ 361,277,773

Sensitivity of the Board's proportionate share of the net OPEB liability to changes in the healthcare trend rates. The following presents the Board's proportionate share of the net OPEB liability, as well as what the District's proportionate share of the net OPEB liability would be if it were calculated using healthcare trend rates that are 1-percentage-point lower or 1-percentage point higher than the current healthcare trend rates:

	1% Decrease (Medical - 4.00-5.50%, Pharmacy - 4.00-9.00%, Medicare Advantage - 4.00%, Administrative - 2.00%)	Healthcare Trend Rates (Medical - 5.00-6.50%, Pharmacy - 5.00-10.00%, Medicare Advantage - 5.00%, Administrative - 3.00%)	1% increase (Medical -6.00-7.50%, Pharmacy - 6.00-11.00%, Medicare Advantage - 6.00%, Administrative - 4.00%)
Net OPEB liability	$ 351,804,771	$ 426,208,809	$ 522,547,544

OPEB plan fiduciary net position. Detailed information about the OPEB plan's fiduciary net position is available in the separately issued ACFR for the State of North Carolina.

2. Disability Benefits

Plan description. Short-term and long-term disability benefits are provided through the Disability Income Plan of North Carolina (DIPNC), a cost-sharing, multiple-employer defined benefit plan, to the eligible members of TSERS which includes employees of the State, the University of North Carolina System, community colleges, certain Local Education Agencies, and ORP.

Management of the plan is vested in the State Health Plan Board of Trustees, which consists of 13 members – eight appointed by the Governor, one appointed by the State Senate, one appointed by the State House of Representatives, and the State Treasurer the State Superintendent and the Director of the Office of State Human Resources who serve as ex-officio members. Management of the plan is vested in the State Health Plan Board of Trustees, which consists of 13 members – eight appointed by the Governor, one appointed by the State Senate, one appointed by the State House of Representatives, and the State Treasurer the State Superintendent and the Director of the Office of State Human Resources who serve as ex-officio members.

The financial statements and other required disclosures for the plan are presented in the State of North Carolina's ACFR, which can be found at https://www.osc.nc.gov/public-information/reports.

Benefits Provided. Long-term disability benefits are payable as an OPEB from DIPNC after the conclusion of the short-term disability period or after salary continuation payments cease, whichever is later, for as long as an employee is disabled. An employee is eligible to receive long-term disability benefits provide the following requirements are met: (1) the employee has five or more years of contributing membership service in TSERS or ORP, earned within 96 months prior to the end of the short-term disability period or cessation of salary continuation payments, whichever is later; (2) the employee must make application to receive long-term benefits within 180 days after the conclusion of the short-term disability period or after salary continuation payments cease or after monthly payments for Workers' Compensation cease (excluding monthly payments for permanent partial benefits), whichever is later; (3) the employee must be certified by the Medical Board to be mentally or physically disabled for the further performance of his/her usual occupation; (4) the disability must have been continuous, likely to be permanent, and incurred at the time of active employment; (5) the employee must not be eligible to receive an unreduced retirement benefit from TSERS after (1) reaching the age of 65 and completing 5 years of membership service, or (2) reaching the age of 60 and completing 25 years of creditable service, or (3) completing 30 years of service at any age.

Contributions. Benefit and contribution provisions are established by Chapter 135, Article 6, of the General Statutes and may be amended only by the North Carolina General Assembly. The plan does not provide for automatic post-retirement benefit increases. Disability income benefits are funded by actuarially determined employer contributions that are established in the Appropriations Bill by the General Assembly and coincide with the State fiscal year. For the fiscal year ended June 30, 2025, employers made a statutory contribution of 0.13% of covered payroll which was equal to the actuarially required contribution. Board contributions to the plan were $343,553 for the year ended June 30, 2025.

The contributions cannot be separated between the amounts that relate to other postemployment benefits and employment benefits for active employees. Those individuals who are receiving extended short-term disability benefit payments cannot be separated from the number of members currently eligible to receive disability benefits as an other postemployment benefit.

At June 30, 2025, the Board reported an asset of $417,054 for its proportionate share of the net DIPNC OPEB asset. The net OPEB asset was measured as of June 30, 2024, and the total OPEB liability used to calculate the net OPEB asset was determined by an actuarial valuation as of December 31, 2023. The total OPEB liability was then rolled forward to the measurement date of June 30, 2024 utilizing update procedures incorporating the actuarial assumptions. The Board's proportion of the net OPEB asset was based on a projection of the Board's present value of future salary, actuarially determined. At June 30, 2024 and 2023, the Board's proportion was 1.2664% and 1.32939 %, respectively.

$343,553 reported as deferred outflows of resources related to OPEB resulting from Board contributions subsequent to the measurement date will be recognized as an increase of the net OPEB asset in the year ending June 30, 2026. Other amounts reported as deferred outflows of resources related to OPEB will be recognized in OPEB expense as follows:

Year ended June 30:	
2026	$ (168,032)
2027	(113,460)
2028	54,701
2029	34,365
2030	25,371
Thereafter	-
Total	$ (167,055)

Actuarial assumptions. Common actuarial assumptions for both OPEB plans follow individual note disclosures for each OPEB plan.

Inflation	2.50%
Salary increases	3.25%-8.05%, include 3.25% inflation and productivity factor
Investment rate of return	3.00%, net of OPEB plan expense, including inflation

Sensitivity of the Board's proportionate share of the net OPEB asset to changes in the discount rate. The following presents the Board's proportionate share of the net OPEB asset, as well as what the District's proportionate share of the net OPEB asset would be if it were calculated using a discount rate that is 1-percentage point lower (2.00 percent) or 1-percentage point higher (4.00 percent) than the current discount rate:

	1% Decrease (2.00%)	Discount Rate (3.00%)	1% Increase (4.00%)
Net OPEB asset	$ (371,873)	$ (417,054)	$ (464,540)

Common actuarial assumptions for both OPEB plans. The total OPEB liability was determined by an actuarial valuation performed as of December 31, 2023 using the following actuarial assumptions, applied to all periods in the measurement, unless otherwise specified. The total OPEB liability was calculated through the use of update procedures to roll forward from the actuarial valuation date to the measurement date of June 30, 2024. The update procedures incorporated the actuarial assumptions used in the valuation. The entry age normal cost method was utilized.

The plan currently uses mortality tables that vary by age, gender, employee group (i.e. teacher, general, law enforcement officer), and health status (i.e. disabled and healthy). The current mortality rates are based on published tables and based on studies that cover significant portions of the U.S. population. The mortality rates also contain a provision to reflect future mortality improvements.

The actuarial assumptions were based on the results of an actuarial experience review for the period January 1, 2015 through December 31, 2019.

DIPNC is primarily invested in the Bond Index Investment Pool as of June 30, 2024. The long-term expected rate of return was determined based on the combination of expected future real rates of return and expected inflation. The long-term expected real rate of return for the Bond Index Investment Pool as of June 30, 2024 is 1.2%.

Following is information related to OPEB expense, proportionate share, assets, liabilities, deferred outflows of resources and deferred inflows of resources reported by the Board as of and for the year ended June 30, 2025:

	RHBF	DIPNC	Total
OPEB Expense (Benefit)	$ 3,099,859	$ 218,813	$ 3,318,672
OPEB Liability (Asset)	426,208,809	(417,054)	425,791,755
Proportionate share of the net OPEB liability (asset)	1.25309%	1.26664%	
Deferred Outflows of Resources			
Differences between expected and actual experience	3,473,851	168,134	3,641,985
Changes of assumptions	102,648,485	6,219	102,654,704
Net difference between projected and actual earnings on plan investments	1,826,374	327,414	2,153,788
Changes in proportion and differences between Board contributions and proportionate share of contributions	5,973,660	39,666	6,013,326
Board contributions subsequent to the measurement date	18,472,578	343,553	18,816,131
Total Deferred Outflows of Resources	132,394,948	884,986	133,279,934
Deferred Inflows of Resources			
Differences between Expected and actual experience	-	479,702	479,702
Changes of assumptions	55,568,927	194,303	55,763,230
Net difference between projected and actual earnings on plan investments	-	-	-
Changes in proportion and differences between Board contributions and proportionate share of contributions	28,130,674	34,483	28,165,157
Total Deferred Inflows of Resources	83,699,601	708,488	84,408,089

2. Accounts Payable

Accounts payable as of June 30, 2025 are as follows:

	Vendors
Governmental activities:	
General Fund	$ 2,028,993
Other Governmental	11,582,733
Total governmental activities	$ 13,611,726
Business-type activities:	
School Food Service Fund	$ 201,459
Child Care Fund	4,436
Total business-type activities	$ 205,895

3. Unearned Revenues

The balances in unearned revenues at year-end have no time restrictions and are composed of the following elements:

	Unearnd Revenues
Governmental Activities:	
Grants not yet earned (Other Special Revenue Fund)	$ 767,638
Business-Type Activities:	
Prepaid lunch balances (School Food Service Fund)	$ 351,008
Prepaid summer camp (After School Program Fund)	38,059
Total	$ 389,067

4. Deferred Outflows and Inflows of Resources

The balances in deferred outflows and inflows of resources at year-end is composed of the following:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	$ 23,237,166	$ 1,122,485
Changes of assumptions	102,654,704	55,763,230
Net difference between projected and actual earnings on pension plan investments	38,008,725	-
Changes in proportion and differences between Board contributions and proportionate share of contributions	7,184,593	34,983,106
Board contributions subsequent to the measurement date	63,187,317	-
Total	$ 234,272,505	$ 91,868,821

5. Risk Management

The Board is exposed to various risks of losses related to torts; theft of, damage to, and destruction of assets; error and omissions; injuries to employees; and natural disasters. The Board maintains general liability and error and omissions coverage of $1 million per claim with $2 million aggregate limit through commercial insurers. The Board also participates in the Public School Insurance Fund (the Fund), a voluntary, self-insured risk control and risk financing fund administered by the North Carolina Department of Insurance. The Fund insures the tangible property assets of the Board. Coverage is provided on an "all risk" perils contract. Buildings and contents are insured on a replacement cost basis. The Fund purchases excel reinsurance to protect the assets of the Fund in the event of a catastrophic event. The Fund maintains a self-insured retention of $10 million. Excess reinsurance is purchased through commercial insurers. A limit of $5 million per occurrence is provided on flood, earthquake, business interruption and extra expense. $10 million per occurrence is provided on increased cost of construction.

The Board also participates in the Teachers' and State Employees' Comprehensive Major Medical Plan, a self-funded risk financing pool of the State administered by Blue Cross and Blue Shield of North Carolina through December 31, 2024 and Aetna thereafter. Through the Plan, permanent full-time employees of

the Board are eligible to receive health care benefits. The Board pays the majority of the cost of coverage for employees enrolled in the Comprehensive Major Medical Plan.

Statutory workers' compensation coverage is provided by The Board through a self-insured fund for employees to the extent they are paid from Federal and local funds. Workers' compensation is provided by the State of North Carolina through a self-insured fund, to the extent employees are paid from State fund. Excess reinsurance is purchased through commercial insurers with a limit of $350,000 per occurrence.

In accordance with G.S. 115C-442, the Board's employees who have custody of the Board's monies at any given time are performance bonded through a commercial surety bond. The finance officer is bonded for $150,000. The remaining employees that have access to funds are bonded under a blanket bond for $100,000.

The Board carries commercial coverage for all other risks of loss. There have been no significant reductions in insurance coverage in the prior year, and claims have not exceeded coverage in any of the past three fiscal years.

6. Contingent Liabilities

At June 30, 2025, the Board was a defendant to various lawsuits and legal claims. In the opinion of the Board's management and the Board's attorney, the ultimate effect of these legal matters will not have a material adverse effect on the Board's financial position.

7. Long-Term Obligations

a. Installment Purchases

The Board is authorized to finance the purchase of school buses under G.S. 115C-528(a). Session law 2003-284, section 7.25 authorized the State Board of Education to allot monies for the payments on financing contracts entered into pursuant to G.S. 115C-528. The State has accepted the bid to purchase Thomas Built Buses through a special third party financing arrangements. The Board entered into such financing contracts for the purchase of school buses during the 2023-2024 and 2024-2025 fiscal years. The original amount of the Board's school bus direct placement installment purchase contracts outstanding at June 30, 2025 totaled $3,457,670. The financing contract requires four principal-only payments with the first payment due within 10 days of receipt of the buses and the following 3 payments due on the next 3 immediately following November 15th dates.

The Board also entered into two direct placement installment purchase contracts for computers, the first contract had an original purchase amount totaling $14,110,391. The financing contract requires quarterly principal and interest payments for 5 years with an interest rate of 3.79%. The second contract had an original purchase amount totaling $3,819,382. The financing contract requires annual principal and interest payments for 5 years with an interest rate of 4.10%.

The future minimum payments of the direct placement installment purchases as of June 30, 2025 are as follows:

Year Ending June 30,	Governmental Activities Principal	Interest
2026	$ 4,560,175	$ 413,991
2027	4,100,954	289,965
2028	3,271,543	152,887
2029	791,307	66,217
2030	823,751	33,774
Total	$ 13,547,730	$ 956,834

b. Long-Term Obligation Activity

The following is a summary of changes in the Board's long-term obligations for the fiscal year ended June 30, 2025:

	July 1, 2024 (As restated)	Increases	Decreases	June 30, 2025	Current Portion
Governmental activities:					
Installment purchases	$ 13,074,590	$ 4,944,060	$ 4,470,920	$ 13,547,730	$ 4,560,175
Net pension liability	248,611,051	-	37,296,766	211,314,285	-
Net OPEB liability	336,892,461	77,307,914	-	414,200,375	-
Compensated absences	91,787,613	-	1,838,952	89,948,661	26,984,598
Total	$ 690,365,715	$ 82,251,974	$ 43,606,638	$ 729,011,051	$ 31,544,773
Business-type activities:					
Net pension liability	$ 6,985,453	$ -	$ 859,062	$ 6,126,391	$ -
Net OPEB liability	9,465,977	2,542,457	-	12,008,434	-
Compensated absences	2,570,335	-	206,912	2,363,423	709,027
Total	$ 19,021,765	$ 2,542,457	$ 1,065,974	$ 20,498,248	$ 709,027

Compensated absences, net pension and net OPEB liabilities related to governmental activities are typically liquidated by the General and other governmental funds. Installment purchases are typically liquidated by the Capital Outlay Fund.

C. Interfund Balances and Activity

1. Transfers to/from other Funds

Transfers to/from other funds at June 30, 2025 consist of the following:

	Amount
From the State Public School Fund to the School Food Service Fund for personnel costs.	$ 62,495

D. Net Position/Fund Balance

1. Net Investment in Capital Assets – Governmental Activities

Net investment in capital assets presented in Exhibit 1 is calculated as follows:

Total governmental activities capital assets	$ 708,826,788
Less:	
Installment purchase obligations for school buses	(1,145,586)
Accounts payable Capital Outlay	(11,405,119)
Net investment in capital assets, governmental activities	$ 696,276,083

2. Fund Balance

The following schedule provides management and citizens with information on the portion of General fund balance that is available for appropriation.

Total fund balance - General Fund	$ 8,273,548
Less:	
Stabilization by State statute	(439,812)
Remaining fund balance	$ 7,833,736

Encumbrances are amounts needed to pay any commitments related to purchase orders and contracts that remain unperformed at year-end. Encumbrances outstanding at June 30, 2025 are as follows:

	Encumbrances
General Fund	$ 263,116
Restricted Revenue Fund	34,683

NOTE 3 – OTHER SPECIAL REVENUE FUND – OTHER REVENUES

Other revenues for the fiscal year ended June 30, 2025 in the Other Special Revenue Fund consists of the following:

Tuition and fees	$ 1,919,862
Medicaid reimbursements	3,098,125
Indirect costs allocated	800,065
Local sales tax refund	758,085
Private grants and donations	185,289
Facility rentals	250,233
Contributions and donations	145,659
Investment income	966,140
Insurance proceeds	131,099
Other reimbursements	2,146,676
Miscellaneous	993,762
Total other revenues	$ 11,394,995

NOTE 4 - SUMMARY DISCLOSURE OF SIGNIFICANT CONTINGENCIES

Federal and State Assisted Programs

The Board has received proceeds from several federal and State grants. Periodic audits of these grants are required and certain costs may be questioned as not being appropriate expenditures under the grant agreements. Such audits could result in the refund of grant moneys to the grantor agencies. Management believes that any required refunds will be immaterial. No provision has been made in the accompanying financial statements for the refund of grant moneys.

NOTE 5 – ACCOUNTING CHANGES

Change in Accounting Principle

Effective July 1, 2024, the Board implemented accounting and financial reporting requirements of GASB Statement 101, Compensated Absences. The statement requires that governments recognize liabilities for sick leave that is attributable to services the employee has rendered, that accumulates and is more likely than not to be used. See the table below for the effects on Board's net position as a result of the adoption of this statement.

Adjustments to and Restatements of Beginning Balances

During the fiscal year ended June 30, 2025, implementation of GASB Statement 101 resulted in restatements of beginning net position and fund net position, as follows:

	Reporting Units Affected by Restatements of Beginning Balances			
	Proprietary Fund		Government-Wide	
	School Food Service	Child Care	Governmental Activities	Business-Type Activities
June 30, 2024 net position (deficit), as previously reported	$ (3,611,698)	$ (215,594)	$ 159,022,475	$ (3,827,292)
Change in accounting principle	(1,661,055)	(126,944)	(70,121,500)	(1,942,722)
June 30, 2024 net position (deficit), as restated	$ (5,272,753)	$ (342,538)	$ 88,900,975	$ (5,770,014)

NOTE 6 – SUBSEQUENT EVENTS

The Board has evaluated subsequent events through December 17, 2025 (the issuance date of the financial statements) and has determined that there were no subsequent events to recognize or disclose in these financial statements.

REQUIRED SUPPLEMENTARY INFORMATION

Schedule of the Board's Proportionate Share of the Net Pension Liability
Teachers' and State Employees' Retirement System

Schedule of Board Contributions
Teachers' and State Employees' Retirement System

Schedule of the Board's Proportionate Share of the Net OPEB Liability
Retiree Health Benefit Fund

Schedule of Board Contributions
Retiree Health Benefit Fund

Schedule of the Board's Proportionate Share of the Net OPEB Liability (Asset)
Disability Income Plan of North Carolina

Schedule of Board Contributions
Disability Income Plan of North Carolina

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REQUIRED SUPPLEMENTARY INFORMATION
SCHEDULE OF THE BOARD'S PROPORTIONATE SHARE OF THE NET PENSION LIABILITY
TEACHERS' AND STATE EMPLOYEES' RETIREMENT SYSTEM
LAST TEN FISCAL YEARS*

	2025	2024	2023	2022	2021
Board's proportion of the net pension liability (asset)	1.46754%	1.53309%	1.53159%	1.46562%	1.58662%
Board's proportionate share of the net pension liability (asset)	$ 217,440,676	$ 255,596,504	$ 227,322,233	$ 68,629,137	$ 191,695,381
Board's covered payroll	$ 258,201,847	$ 248,586,771	$ 239,723,906	$ 222,905,839	$ 230,000,188
Board's proportionate share of the net pension liability (asset) as a percentage of its covered payroll	84.21%	102.82%	94.83%	30.79%	83.35%
Plan fiduciary net position as a percentage of the total pension liability	85.35%	82.97%	84.14%	94.86%	89.51%

	2020	2019	2018	2017	2016
Board's proportion of the net pension liability (asset)	1.58218%	1.55636%	1.59601%	1.58302%	1.57303%
Board's proportionate share of the net pension liability (asset)	$ 164,023,920	$ 154,952,587	$ 126,634,472	$ 145,495,891	$ 57,969,270
Board's covered payroll	$ 230,661,877	$ 214,696,602	$ 209,780,447	$ 205,208,988	$ 203,706,430
Board's proportionate share of the net pension liability (asset) as a percentage of its covered payroll	71.11%	72.17%	60.37%	70.90%	28.46%
Plan fiduciary net position as a percentage of the total pension liability	87.56%	87.61%	89.51%	87.32%	94.64%

* The amounts presented for each fiscal year were determined as of the prior fiscal year ending June 30.

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REQUIRED SUPPLEMENTARY INFORMATION
SCHEDULE OF BOARD CONTRIBUTIONS
TEACHERS' AND STATE EMPLOYEES' RETIREMENT SYSTEM
LAST TEN FISCAL YEARS

	2025	2024	2023	2022	2021
Contractually required contribution	$ 44,371,186	$ 45,521,181	$ 43,204,381	$ 39,266,776	$ 32,927,904
Contributions in relation to the contractually required contribution	44,371,186	45,521,181	43,204,381	39,266,776	32,927,904
Contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
Board's covered payroll	$ 264,271,424	$ 258,201,847	$ 248,586,771	$ 239,723,906	$ 222,905,839
Contributions as a percentage of covered payroll	16.79%	17.63%	17.38%	16.38%	14.87%

	2020	2019	2018	2017	2016
Contractually required contribution	$ 30,022,566	$ 28,348,345	$ 23,144,294	$ 20,936,089	$ 18,776,622
Contributions in relation to the contractually required contribution	30,022,566	28,348,345	23,144,294	20,936,089	18,776,622
Contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
Board's covered payroll	$ 230,000,188	$ 230,661,877	$ 214,696,602	$ 209,780,447	$ 205,208,988
Contributions as a percentage of covered payroll	12.97%	12.29%	10.78%	9.98%	9.15%

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REQUIRED SUPPLEMENTARY INFORMATION
SCHEDULE OF THE BOARD'S PROPORTIONATE SHARE OF THE NET OPEB LIABILITY
RETIREE HEALTH BENEFIT FUND
LAST NINE FISCAL YEARS*

	2025	2024	2023	2022	2021
Board's proportion of the net OPEB liability/asset	1.25309%	1.29846%	1.31741%	1.27629%	1.37306%
Board's proportionate share of the net OPEB liability (asset)	$426,208,809	$346,004,873	$312,844,184	$394,572,560	$380,897,241
Board's covered payroll	$258,201,847	$248,586,771	$239,723,906	$222,905,839	$230,000,188
Board's proportionate share of the net OPEB liability/asset as a percentage of its covered payroll	165.07%	139.19%	130.50%	177.01%	165.61%
Plan fiduciary net position as a percentage of the total OPEB liability/asset	9.79%	10.73%	10.58%	7.72%	6.92%

	2020	2019	2018	2017
Board's proportion of the net OPEB liability/asset	1.37258%	1.27629%	1.45493%	1.39123%
Board's proportionate share of the net OPEB liability (asset)	$434,277,197	$394,819,992	$477,021,010	$605,230,565
Board's covered payroll	$230,661,877	$214,696,602	$209,780,447	$205,208,988
Board's proportionate share of the net OPEB liability/asset as a percentage of its covered payroll	188.27%	183.90%	227.39%	294.93%
Plan fiduciary net position as a percentage of the total OPEB liability/asset	4.40%	4.40%	3.52%	2.41%

* The amounts presented for each fiscal year were determined as of the prior fiscal year ending June 30.

Note: This is a ten year schedule. However, GASB 75 was not adopted until the fiscal year ended June 30, 2018. Therefore, there are only nine years of data presented.

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REQUIRED SUPPLEMENTARY INFORMATION
SCHEDULE OF BOARD CONTRIBUTIONS
RETIREE HEALTH BENEFIT FUND
LAST TEN FISCAL YEARS

	2025	2024	2023	2022	2021
Contractually required contribution	$ 18,472,578	$ 18,435,691	$ 17,127,629	$ 15,078,634	$ 14,882,165
Contributions in relation to the contractually required contribution	18,472,578	18,435,691	17,127,629	15,078,634	14,882,165
Contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
Board's covered payroll	$ 264,271,424	$ 258,201,847	$ 248,586,771	$ 239,723,906	$ 222,905,839
Contributions as a percentage of covered payroll	6.99%	7.14%	6.89%	6.29%	6.68%

	2020	2019	2018	2017	2016
Contractually required contribution	$ 14,976,562	$ 14,462,500	$ 12,989,144	$ 12,165,615	$ 11,436,286
Contributions in relation to the contractually required contribution	14,976,562	14,462,500	12,989,144	12,165,615	11,436,286
Contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
Board's covered payroll	$ 230,000,188	$ 230,661,877	$ 214,696,602	$ 209,780,447	$ 205,208,988
Contributions as a percentage of covered payroll	6.47%	6.27%	6.05%	5.81%	5.60%

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REQUIRED SUPPLEMENTARY INFORMATION
SCHEDULE OF THE BOARD'S PROPORTIONATE SHARE OF THE NET OPEB LIABILITY (ASSET)
DISABILITY INCOME PLAN OF NORTH CAROLINA
LAST NINE FISCAL YEARS*

	2025	2024	2023	2022	2021
Board's proportion of the net OPEB liability/asset	1.26664%	1.32939%	1.33101%	1.28889%	1.38670%
Board's proportionate share of the net OPEB liability (asset)	$ (417,054)	$ 353,565	$ 395,949	$ (210,527)	$ (682,173)
Board's covered payroll	$ 258,201,847	$ 248,586,771	$ 239,723,906	$ 222,905,839	$ 230,000,188
Board's proportionate share of the net OPEB liability/asset as a percentage of its covered payroll	-0.16%	0.14%	0.17%	0.09%	0.30%
Plan fiduciary net position as a percentage of the total OPEB liability/asset	114.99%	90.61%	90.34%	105.18%	115.57%

	2020	2019	2018	2017
Board's proportion of the net OPEB liability/asset	1.39364%	1.37598%	1.40907%	1.41358%
Board's proportionate share of the net OPEB liability (asset)	$ (601,356)	$ (417,968)	$ (861,224)	$ (877,833)
Board's covered payroll	$ 230,661,877	$ 214,696,602	$ 209,780,447	$ 205,208,988
Board's proportionate share of the net OPEB liability/asset as a percentage of its covered payroll	0.26%	0.19%	0.41%	0.43%
Plan fiduciary net position as a percentage of the total OPEB liability/asset	113.00%	108.47%	116.23%	116.06%

* The amounts presented for each fiscal year were determined as of the prior fiscal year ending June 30.

Note: This is a ten year schedule. However, GASB 75 was not adopted until the fiscal year ended June 30, 2018. Therefore, there are only nine years of data presented.

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REQUIRED SUPPLEMENTARY INFORMATION
SCHEDULE OF BOARD CONTRIBUTIONS
DISABILITY INCOME PLAN OF NORTH CAROLINA
LAST TEN FISCAL YEARS

	2025	2024	2023	2022	2021
Contractually required contribution	$ 343,553	$ 284,023	$ 248,587	$ 215,752	$ 200,508
Contributions in relation to the contractually required contribution	343,553	284,023	248,587	215,752	200,508
Contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
Board's covered payroll	$ 264,271,424	$ 258,201,847	$ 248,586,771	$ 239,723,906	$ 222,905,839
Contributions as a percentage of covered payroll	0.13%	0.11%	0.10%	0.09%	0.09%

	2020	2019	2018	2017	2016
Contractually required contribution	$ 230,000	$ 322,927	$ 300,575	$ 795,686	$ 837,300
Contributions in relation to the contractually required contribution	230,000	322,927	300,575	795,686	837,300
Contribution deficiency (excess)	$ -	$ -	$ -	$ -	$ -
Board's covered payroll	$ 230,000,188	$ 230,661,877	$ 214,696,602	$ 209,780,447	$ 205,208,988
Contributions as a percentage of covered payroll	0.10%	0.14%	0.14%	0.38%	0.41%

Supplementary Information
General Fund

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE - BUDGET AND ACTUAL
GENERAL FUND
For the Fiscal Year Ended June 30, 2025

	Final Budget	Actual	Variance With Final Budget
Revenues:			
Union County:			
County appropriation	$ 130,611,680	$ 130,611,680	$ -
Other:			
Fines and forfeitures	916,380	916,380	-
ABC revenues	218,629	218,629	-
Total other	1,135,009	1,135,009	-
Total revenues	131,746,689	131,746,689	-
Expenditures:			
Current:			
Instructional services:			
Regular instructional	29,747,778	29,725,499	22,279
Special populations	4,960,449	4,943,627	16,822
Alternative programs	4,463,543	4,456,415	7,128
School leadership	15,327,899	15,327,676	223
Co-curricular	2,634,850	2,604,551	30,299
School-based support	10,223,627	10,164,394	59,233
Total instructional services	67,358,146	67,222,162	135,984
System-wide support services:			
Support and development	3,177,253	3,073,972	103,281
Special population support and development	450,530	450,529	1
Alternative programs and services support and development	176,490	165,128	11,362
Technology support	4,538,479	4,510,458	28,021
Operational support	29,915,638	29,724,843	190,795
Financial and human resource services	8,952,195	8,651,803	300,392
Accountability	511,630	455,541	56,089
System-wide pupil support	628,851	626,525	2,326
Policy, leadership and public relations	3,827,741	3,749,999	77,742
Total system-wide support services	52,178,807	51,408,798	770,009

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE - BUDGET AND ACTUAL (Continued)
GENERAL FUND
For the Fiscal Year Ended June 30, 2025

	Final Budget	Actual	Variance With Final Budget
Expenditures: (Continued)			
Current:			
Ancillary services:			
Nutrition	360,962	288,532	72,430
Nonprogrammed charges:			
Payments to other governments	14,317,883	14,317,883	-
Total expenditures	134,215,798	133,237,375	978,423
Revenues over (under) expenditures	(2,469,109)	(1,490,686)	978,423
Fund balance appropriated	2,469,109	-	(2,469,109)
Net change in fund balance	$ -	(1,490,686)	$ (1,490,686)
Fund balance:			
Beginning of year		9,764,234	
End of year		$ 8,273,548	

Supplementary Information
Capital Outlay Fund

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE - BUDGET AND ACTUAL
CAPITAL OUTLAY FUND
For the Fiscal Year Ended June 30, 2025

	Final Budget	Actual	Variance With Final Budget
Revenues:			
State of North Carolina:			
K-12 Athletic Facilities Grant	$ 1,800,000	$ 1,800,000	$ -
State Buses Appropriation	1,398,358	1,398,358	-
Total State of North Carolina	3,198,358	3,198,358	-
Union County:			
Bond proceeds	127,581,186	60,946,982	(66,634,204)
County appropriations	49,544,159	25,934,315	(23,609,844)
Total Union County	177,125,345	86,881,297	(90,244,048)
Other:			
Interest earned on investments	-	150,533	150,533
Proceeds from disposal of capital assets	-	29,633	29,633
Other	-	157,390	157,390
Total other	-	337,556	337,556
Total revenues	180,323,703	90,417,211	(89,906,492)
Expenditures:			
Debt service:			
Principal retirement	4,470,920	4,470,920	-
Interest and fees	375,259	375,259	-
Total debt service	4,846,179	4,846,179	-
Capital outlay:			
Real property and buildings	164,130,550	80,472,705	83,657,845
Furnishings and equipment	14,736,475	7,847,562	6,888,913
Buses and motor vehicles	3,087,498	2,052,036	1,035,462
Total capital outlay	181,954,523	90,372,303	91,582,220
Total expenditures	186,800,702	95,218,482	91,582,220
Revenues over (under) expenditures	(6,476,999)	(4,801,271)	1,675,728
Other financing sources:			
Installment purchase obligations issued	5,508,859	4,944,060	(564,799)
Fund balance appropriated	968,140	-	(968,140)
Net change in fund balance	$ -	142,789	$ 142,789
Fund balance:			
Beginning of year		2,623,945	
End of year		$ 2,766,734	

Supplementary Information
Enterprise Funds

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REVENUES AND EXPENDITURES - BUDGET AND ACTUAL (NON-GAAP)
SCHOOL FOOD SERVICE FUND
For the Fiscal Year Ended June 30, 2025

	Final Budget	Actual	Variance With Final Budget
Operating revenues - food sales	$ 7,565,720	$ 7,594,668	$ 28,948
Operating expenditures:			
Business support services:			
Purchase of food	-	7,186,617	-
Donated commodities	-	1,232,161	-
Salaries and benefits	-	11,847,835	-
Materials and supplies	-	98,310	-
Repairs and maintenance	-	61,591	-
Non-capitalized equipment	-	120,068	-
Contracted services	-	215,080	-
Other	-	221,939	-
Capital outlay	-	299,002	-
Total operating expenditures	22,566,877	21,282,603	1,284,274
Operating loss	(15,001,157)	(13,687,935)	1,313,222
Nonoperating revenues:			
Federal reimbursements	11,649,229	11,570,900	(78,329)
Federal commodities	1,046,752	1,232,161	185,409
State reimbursements	40,000	33,242	(6,758)
Interest earned	200	177,224	177,024
Total nonoperating revenues	12,736,181	13,013,527	277,346
Revenues over (under) expenditures	(2,264,976)	(674,408)	1,590,568
Other financing sources:			
Transfers from other funds	-	62,495	62,495
Fund balance appropriated	2,264,976	-	(2,264,976)
Net change in fund balance	$ -	(611,913)	$ (611,913)

	Final Budget	Actual	Variance With Final Budget
Reconciliation of modified accrual to full accrual basis:			
Reconciling items:			
Depreciation		(268,895)	
Capital contributions		362,136	
Net OPEB asset		10,205	
Net pension liability		689,579	
Net OPEB liability		(2,284,711)	
Deferred outflows		525,466	
Deferred inflows		718,761	
Equipment purchases		299,002	
Decrease in compensated absences payable		199,900	
Decrease in inventories		(78,425)	
Change in net position (full accrual)		$ (438,895)	

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF REVENUES AND EXPENDITURES - BUDGET AND ACTUAL (NON-GAAP)
AFTER SCHOOL PROGRAM
For the Fiscal Year Ended June 30, 2025

	Final Budget	Actual	Variance With Final Budget
Operating revenues:			
Child care fees	$ 2,918,000	$ 3,020,273	$ 102,273
Operating expenditures:			
Regular community services:			
Purchase of food	-	149,703	-
Salaries and benefits	-	2,334,130	-
Materials and supplies	-	115,357	-
Contracted services	-	3,328	-
Field trips	-	31,447	-
Bank service fees	-	91,154	-
Other	-	21,857	-
Total operating expenditures	2,918,000	2,746,976	171,024
Operating income	-	273,297	273,297
Nonoperating revenues:			
Interest earned	-	12,592	12,592
Net change in fund balance	$ -	285,889	$ 571,778
Reconciliation of modified accrual to full accrual basis:			
Reconciling items:			
Net OPEB asset		1,545	
Net pension liability		169,483	
Net OPEB liability		(257,746)	
Deferred outflows		23,185	
Deferred inflows		140,949	
Decrease in compensated absences payable		7,012	
Change in net position (full accrual)		$ 370,317	

Statistical Section

STATISTICAL SECTION
(Unaudited)

The Statistical Section of the District's Annual Comprehensive Financial Report (ACFR) presents detailed information as a context for understanding what the information in the financial statements, note disclosures, and required supplementary information says about the District's overall financial outlook.

Sections

Financial Trends

These schedules contain trend information to help the reader understand how the District's financial performance and operations have changed over time.

Revenue Capacity

Since the District's local revenues are primarily provided by Union County, these schedules on the county's revenue sources are relevant to an understanding of Union County's most significant local revenue source, the property tax.

Debt Capacity

Since the District has no tax-levying or debt-issuing authority, the County of Union provides significant funding to the school system. Selected fiscal data from the County of Union has been included to help the reader better understand the school system and its financial operations.

Demographic and Economic Information

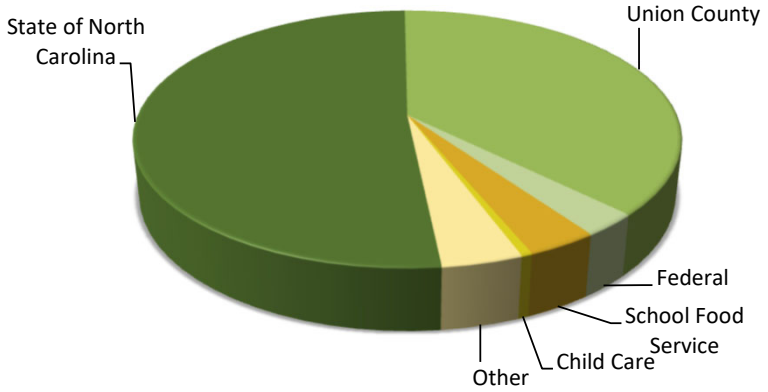
These schedules offer demographic and economic indicators to help the reader understand the environment within which the District's financial activities take place. County information is included.

Operating Information

These schedules contain service data to help the reader understand how the information in the District's financial report relates to the services the District provides and the activities it performs.

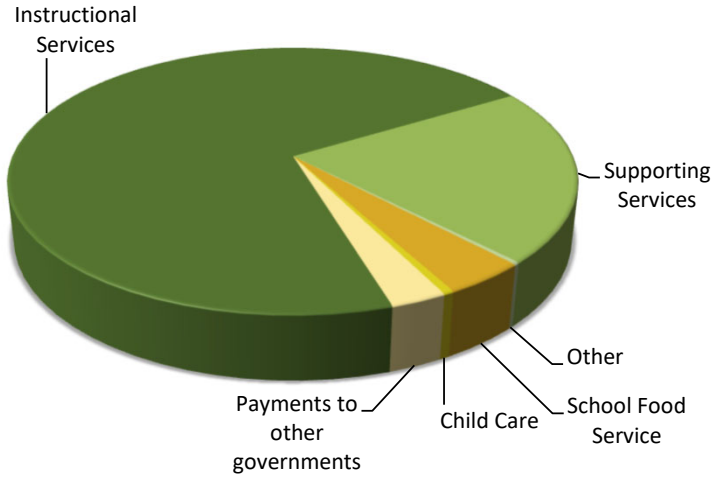
Union County Public Schools
Financial Perspective
Governmental and Business-type Activities
for Fiscal Year 2024-2025

Revenue Sources



State of North Carolina	$298,655,386
Union County	217,492,977
Federal	16,560,855
School Food Service	20,608,195
Child Care	3,204,770
Other	23,462,596
Total	$579,984,779

Expenditures/Expenses



Instructional Services	$373,543,797
Supporting Services	111,878,025
Other	1,454,818
School Food Service	21,471,721
Child Care	2,662,548
Payments to other governments	14,356,558
Total	$525,367,467

UNION COUNTY BOARD OF EDUCATION

Net Position by Component

Last Ten Fiscal Years

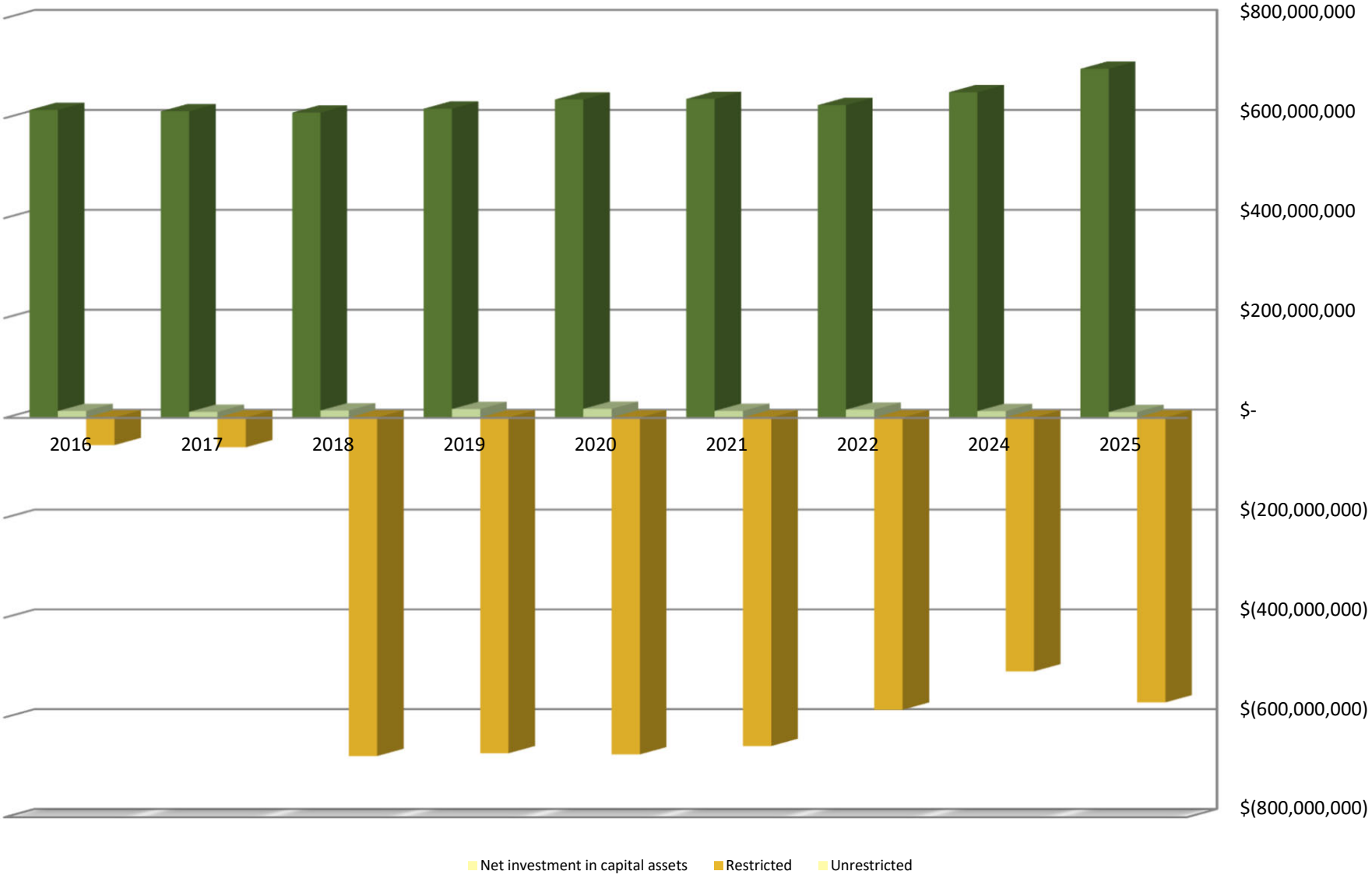
Year Ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Governmental activities:										
Net investment in capital assets	$ 613,175,982	$ 610,517,140	$ 608,109,615	$ 616,289,064	$ 635,033,673	$ 636,437,194	$ 624,218,257	$ 613,904,885	$ 649,929,031	$ 696,276,083
Restricted	12,931,221	11,174,475	13,965,960	18,226,389	17,194,566	13,137,634	15,550,725	14,769,380	12,805,200	10,825,512
Unrestricted	(61,287,021)	(65,657,560)	(668,185,109)	(663,752,069)	(663,378,236)	(646,437,401)	(577,637,242)	(535,765,181)	(503,711,756)	(563,514,730)
Total governmental activities net position (deficit)	$ 564,820,182	$ 556,034,055	$ (46,109,534)	$ (29,236,616)	$ (11,149,997)	$ 3,137,427	$ 62,131,740	$ 92,909,084	$ 159,022,475	$ 143,586,865
Business-type activities:										
Net investment in capital assets	$ 2,326,313	$ 2,258,881	$ 2,019,233	$ 1,715,381	$ 1,353,447	$ 1,092,521	$ 902,243	$ 942,495	$ 1,156,307	$ 1,548,550
Restricted	-	-	40,047	46,315	39,911	28,590	27,077	-	-	16,723
Unrestricted	5,898,083	5,921,625	(10,241,650)	(10,592,734)	(11,770,212)	(11,959,617)	(8,005,413)	(3,082,552)	(4,983,599)	(7,403,865)
Total business-type activities net position (deficit)	$ 8,224,396	$ 8,180,506	$ (8,182,370)	$ (8,831,038)	$ (10,376,854)	$ (10,838,506)	$ (7,076,093)	$ (2,140,057)	$ (3,827,292)	$ (5,838,592)
District-wide										
Net investment in capital assets	$ 615,502,295	$ 612,776,021	$ 610,128,848	$ 618,004,445	$ 636,387,120	$ 637,529,715	$ 625,120,500	$ 651,085,338	$ 651,085,338	$ 697,824,633
Restricted	12,931,221	11,174,475	14,006,007	16,828,764	17,234,477	13,166,224	15,577,802	12,805,200	12,805,200	10,842,235
Unrestricted	(55,388,938)	(59,735,935)	(678,426,759)	(672,900,863)	(675,148,448)	(658,397,018)	(585,642,655)	(508,695,355)	(508,695,355)	(570,918,595)
Total primary government net position (deficit)	$ 573,044,578	$ 564,214,561	$ (54,291,904)	$ (38,067,654)	$ (21,526,851)	$ (7,701,079)	$ 55,055,647	$ 155,195,183	$ 155,195,183	$ 137,748,273

Source: Union County Board of Education, North Carolina, Annual Financial Report for the year ended June 30, 2025

Note: Net position for 2015 and before are not comparable to 2016 and after net position due to the implementation of GASB 68, *Accounting and Financial Reporting for Pensions,* for the year ended June 30, 2015.

Note: Net position for 2017 and before are not comparable to 2018 and after net position due to the implementation of GASB 75, *Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions,* for the year ended June 30, 2018.

Net Position by Component
District-wide



UNION COUNTY BOARD OF EDUCATION

Changes in Net Position
Last Ten Fiscal Years

Year Ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Expenses										
Governmental activities:										
Instructional programs	$ 268,863,424	$ 297,441,622	$ 318,252,404	$ 309,812,306	$ 324,831,555	$ 314,393,802	$ 306,472,207	$ 320,155,756	$ 372,017,013	$ 373,543,797
Support services	67,447,945	70,562,303	78,469,303	80,904,190	77,365,356	82,778,542	81,971,931	113,202,444	99,838,077	111,878,025
Ancillary services and non-programed charges	396,986	406,072	334,533	381,556	1,148,373	1,157,982	1,122,526	1,427,457	156,122	520,433
Payments to other governments	4,134,834	6,336,147	7,689,071	8,259,022	9,155,819	10,123,908	10,269,513	11,157,808	12,915,890	14,356,558
Interest on long-term debt	-	-	-	181,782	175,542	181,597	116,900	125,971	448,437	375,259
Unallocated depreciation expense	2,242,067	2,195,386	1,895,343	1,225,276	1,434,253	894,306	742,739	589,356	468,002	559,126
Total governmental activities expenses	343,085,256	376,941,530	406,640,654	400,764,132	414,110,898	409,530,137	400,695,816	446,658,792	485,843,541	501,233,198
Business-type activities:										
School food service	17,050,233	16,662,707	16,940,632	16,139,109	14,765,642	11,396,561	20,939,710	16,925,786	23,478,990	21,471,721
After School Program	4,720,871	4,484,919	4,498,938	4,549,198	3,910,634	175,895	2,360,834	1,823,022	2,857,094	2,662,548
Total business-type activities expenses	21,771,104	21,147,626	21,439,570	20,688,307	18,676,276	11,572,456	23,300,544	18,748,808	26,336,084	24,134,269
Total primary government expenses	$ 364,856,360	$ 398,089,156	$ 428,080,224	$ 421,452,439	$ 432,787,174	$ 421,102,593	$ 423,996,360	$ 465,407,600	$ 512,179,625	$ 525,367,467
Program Revenues										
Governmental activities:										
Charges for services:										
Tuition and fees	$ 1,416,419	$ 1,644,574	$ 1,893,507	$ 1,297,441	$ 1,232,155	$ 1,235,937	$ 1,389,395	$ 1,269,311	$ 2,035,022	$ 1,919,862
Rental of school property	179,149	148,777	190,842	197,046	135,139	61,051	109,077	136,042	197,903	250,233
Co-curricular	11,689,239	12,020,996	11,179,848	10,223,717	9,285,934	4,156,101	8,126,240	9,784,552	11,912,308	11,234,503
Operating grants and contributions	232,060,542	240,419,051	249,108,658	269,100,942	275,242,644	284,002,564	317,630,032	319,015,600	328,109,216	315,446,956
Capital grants and contributions	108,905	432,676	390,534	456,440	449,980	565,854	1,311,178	2,168,758	2,129,026	3,198,358
Total governmental activities program revenues	245,454,254	254,666,074	262,763,389	281,275,586	286,345,852	290,021,507	328,565,922	332,374,263	344,383,475	332,049,912
Business-type activities:										
Charges for services:										
School food service	7,101,713	6,839,980	6,534,170	6,600,918	4,968,783	939,030	2,371,551	7,861,668	7,788,029	7,594,668
After School Program	4,272,109	4,445,747	4,378,247	4,264,522	3,013,080	661,893	2,724,801	3,232,699	3,204,714	3,020,273
Operating grants and contributions	9,585,387	9,755,850	9,510,823	8,923,241	7,718,905	8,828,533	21,870,520	12,507,549	13,498,549	12,836,303
Capital grants and contributions	24,390	25,000	23,000	-	7,425	-	31,701	20,563	20,822	362,136
Total business-type activities program revenues	20,983,599	21,066,577	20,446,240	19,788,681	15,708,193	10,429,456	26,998,573	23,622,479	24,512,114	23,813,380
Total district-wide	$ 266,437,853	$ 275,732,651	$ 283,209,629	$ 301,064,267	$ 302,054,045	$ 300,450,963	$ 355,564,495	$ 355,996,742	$ 368,895,589	$ 355,863,292
Net (expense) / revenue										
Governmental activities	$ (97,631,002)	$ (122,275,456)	$ (143,877,265)	$ (119,488,546)	$ (127,765,046)	$ (119,508,630)	$ (72,129,894)	$ (114,284,529)	$ (141,460,066)	$ (169,183,286)
Business-type activities	(787,505)	(81,049)	(993,330)	(899,626)	(2,968,083)	(1,143,000)	3,698,029	4,873,671	(1,823,970)	(320,889)
Total district-wide	$ (98,418,507)	$ (122,356,505)	$ (144,870,595)	$ (120,388,172)	$ (130,733,129)	$ (120,651,630)	$ (68,431,865)	$ (109,410,858)	$ (143,284,036)	$ (169,504,175)

UNION COUNTY BOARD OF EDUCATION

Changes in Net Position (Continued)
Last Ten Fiscal Years

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2024
General Revenues and Other Changes in Net Position										
Governmental activities:										
Unrestricted county appropriations - operating	$ 92,269,358	$ 94,979,912	$ 97,680,174	$ 100,649,263	$ 102,942,093	$ 109,187,700	$ 112,169,279	$ 116,450,157	$ 123,074,926	$ 131,369,765
Unrestricted county appropriations - capital	18,909,151	16,814,882	16,934,107	34,086,582	42,545,304	24,113,621	17,819,185	26,967,076	81,788,056	86,881,297
Investment earnings, unrestricted	116,015	149,275	246,894	359,955	341,647	9,113	(408,412)	213,512	872,985	1,116,673
Unrestricted miscellaneous	1,474,320	1,505,025	2,781,713	1,380,833	1,284,324	1,133,646	1,593,627	1,483,197	1,892,827	4,563,936
Transfers	(37,150)	40,235	34,773	(115,169)	(1,261,703)	(648,026)	(49,472)	(52,069)	(55,337)	(62,495)
Total governmental activities	112,731,694	113,489,329	117,677,661	136,361,464	145,851,665	133,796,054	131,124,207	145,061,873	207,573,457	223,869,176
Business-type activities:										
Investment earnings, unrestricted	57,273	85,794	98,203	127,387	160,087	102	6,712	14,814	84,381	189,816
Miscellaneous, unrestricted	12,590	(8,400)	6,265	8,402	477	33,220	8,200	(4,518)	(2,983)	-
Transfers	37,150	(40,235)	(34,773)	115,169	1,261,703	648,026	49,472	52,069	55,337	62,495
Total business-type activities	107,013	37,159	69,695	250,958	1,422,267	681,348	64,384	62,365	136,735	252,311
Total district-wide	$ 112,838,707	$ 113,526,488	$ 117,747,356	$ 136,612,422	$ 147,273,932	$ 134,477,402	$ 131,188,591	$ 145,124,238	$ 207,710,192	$ 224,121,487
Change in Net Position										
Governmental activities	$ 6,584,867	$ 15,100,692	$ (8,786,127)	$ (26,199,604)	$ 16,872,918	$ 58,994,313	$ 16,839,678	$ 66,113,391	$ 207,573,457	$ 54,685,890
Business-type activities	(555,826)	(680,492)	(43,890)	(923,635)	(648,668)	3,762,413	4,938,055	(1,687,235)	136,735	(68,578)
Total district-wide	$ 6,029,041	$ 14,420,200	$ (8,830,017)	$ (27,123,239)	$ 16,224,250	$ 62,756,726	$ 21,777,733	$ 64,426,156	$ 207,710,192	$ 54,617,312

Source: Union County Board of Education, North Carolina, Annual Financial Report for the year ended June 30, 2025.

UNION COUNTY BOARD OF EDUCATION

Governmental Funds
Fund Balances
Last Ten Fiscal Years

Year Ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
General Fund										
Restricted	$ 3,808,346	$ 1,272,528	$ 604,367	$ 1,208,352	$ 430,361	$ 673,860	$ 98,228	$ 1,671,786	$ 369,136	$ 439,812
Assigned	2,700,000	3,812,000	-	-	-	2,860,000	2,999,117	2,429,533	2,469,109	-
Unassigned	1,833	1,896,467	5,558,160	165,098	1,602,910	9,446,925	10,396,432	6,399,672	6,925,989	7,833,736
Total General Fund	$ 6,510,179	$ 6,980,995	$ 6,162,527	$ 1,373,450	$ 2,033,271	$12,980,785	$13,493,777	$10,500,991	$ 9,764,234	$ 8,273,548
All Other Governmental Funds										
Restricted	$ 9,122,875	$ 9,901,947	$11,046,234	$13,773,589	$15,192,359	$11,267,877	$14,508,342	$13,097,594	$12,436,064	$ 9,808,871
Assigned	4,004,899	4,148,287	5,498,436	2,807,089	4,111,052	4,948,290	4,176,008	5,236,841	3,067,105	6,891,944
Total all other governmental funds	$13,127,774	$14,050,234	$16,544,670	$16,580,678	$19,303,411	$16,216,167	$18,684,350	$18,334,435	$15,503,169	$16,700,815

Source: Union County Board of Education, North Carolina, Annual Financial Report for the year ended June 30, 2025.

UNION COUNTY BOARD OF EDUCATION

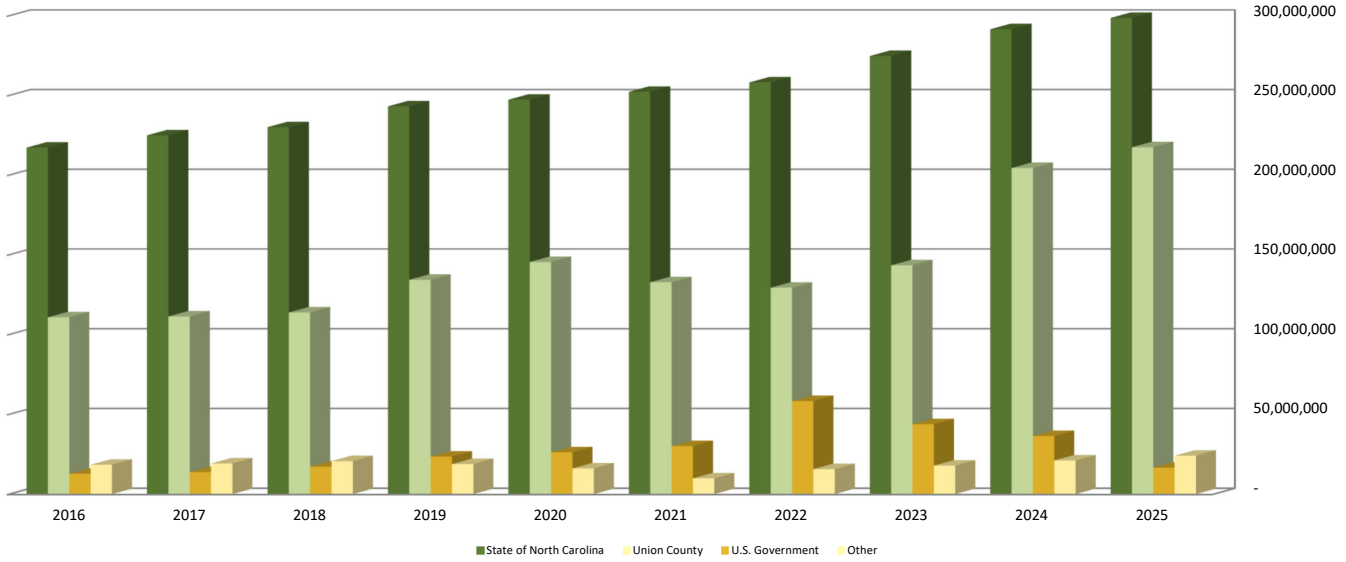
Changes in Fund Balances of Governmental Funds
Last Ten Fiscal Years

Year Ended June 30	2016	2017	2018	2019	2020
Revenues					
State of North Carolina	217,256,985	224,977,572	230,087,058	243,174,564	$ 247,327,813
Union County	110,831,819	111,359,717	113,850,566	134,360,350	145,487,397
U.S. Government	12,753,697	13,857,626	17,273,385	23,520,163	26,195,246
Other	18,439,176	19,225,140	20,705,694	18,825,096	16,115,046
Total revenues	359,281,677	369,420,055	381,916,703	419,880,173	435,125,502
Expenditures					
Instructional programs	267,072,697	276,401,599	282,174,501	313,511,999	306,823,719
Support services	69,402,493	68,249,693	73,356,072	74,907,525	75,320,334
Ancillary services	412,709	398,242	304,763	399,070	1,142,572
Non-programmed charges	4,135,017	6,336,270	8,230,767	8,979,126	9,832,101
Debt service					
Principal retirement	108,905	432,676	390,534	1,975,995	1,958,142
Interest and fees	-	-	-	181,782	175,542
Capital outlay	19,268,162	17,206,482	15,818,871	32,644,399	38,718,508
Total expenditures	360,399,983	369,024,962	380,275,508	432,599,896	433,970,918
Excess of revenues over (under) expenditures	(1,118,306)	395,093	1,641,195	(12,719,723)	1,154,584
Other financing sources (uses)					
Installment purchase obligations issued	604,188	957,948	-	8,081,823	3,489,673
Transfers in (out)	(37,150)	40,235	34,773	(115,169)	(1,261,703)
Net change in fund balances	$ (1,155,456)	$ 1,393,276	$ 1,675,968	$ (4,753,069)	$ 3,382,554
Ratio of debt service expenditures to total noncapital expenditures	0.03%	0.12%	0.11%	0.52%	0.53%

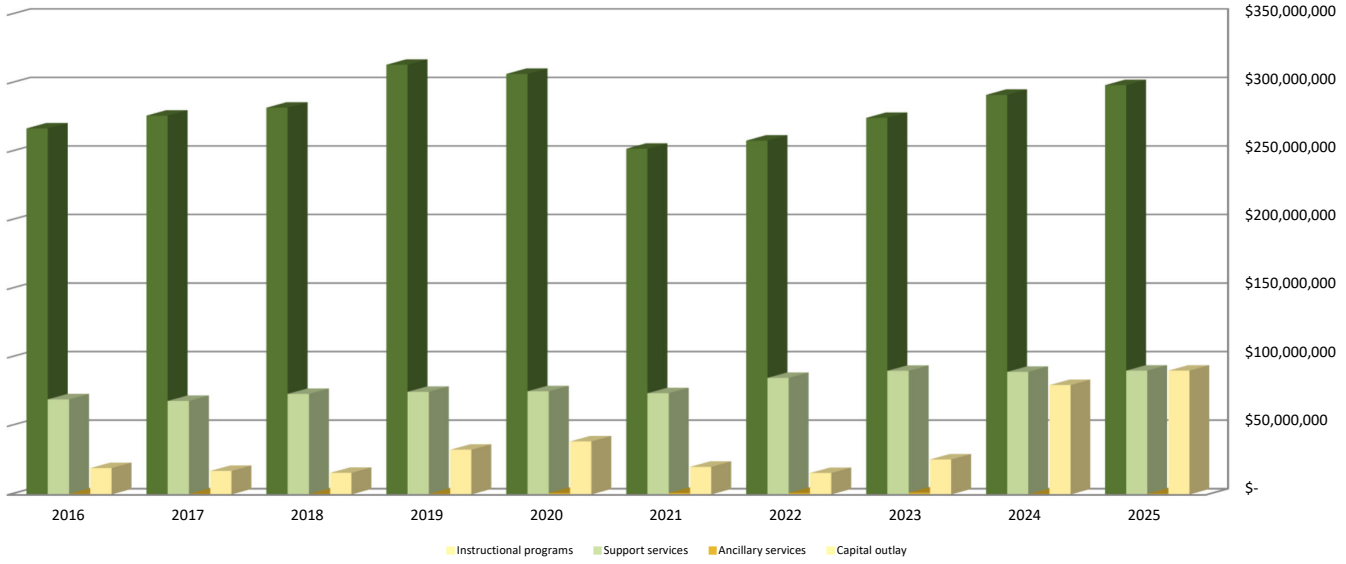
Year Ended June 30	2021	2022	2023	2024	2025
Revenues					
State of North Carolina	$ 252,253,566	$ 258,182,527	$ 274,756,110	$ 291,562,397	$ 298,655,386
Union County	132,809,666	129,365,230	143,417,233	204,478,470	217,492,977
U.S. Government	30,127,633	58,322,123	43,807,666	36,387,973	16,560,855
Other	9,905,417	15,700,463	17,869,456	21,135,015	24,102,063
Total revenues	425,096,282	461,570,343	479,850,465	553,563,855	556,811,281
Expenditures					
Instructional programs	308,450,633	343,548,760	364,360,992	371,077,474	360,717,324
Support Services	73,872,638	85,047,924	90,211,499	89,464,790	90,373,024
Ancillary services	1,157,982	1,122,526	1,427,457	156,122	520,433
Non-programmed charges	10,754,603	11,268,483	12,555,797	13,551,859	15,156,623
Debt service					
Principal retirement	2,850,354	3,660,373	4,009,735	4,900,402	4,470,920
Interest and fees	181,597	116,900	125,971	448,437	375,259
Capital outlay	20,175,488	15,693,032	25,571,117	79,810,449	90,372,303
Total expenditures	417,443,295	460,457,998	498,262,568	559,409,533	561,985,886
Excess of revenues over (under) expenditures	7,652,987	1,112,345	(18,412,103)	(5,845,678)	(5,174,605)
Other financing sources (uses)					
Installment purchase obligations issued	855,309	1,918,302	15,121,471	2,332,992	4,944,060
Transfers in (out)	(648,026)	(49,472)	(52,069)	(55,337)	(62,495)
Net change in fund balances	$ 7,860,270	$ 2,981,175	$ (3,342,701)	$ (3,568,023)	$ (293,040)
Ratio of debt service expenditures to total noncapital expenditures	0.76%	0.84%	0.85%	1.09%	0.98%

Source: Union County Board of Education, North Carolina, Annual Financial Report for the year ended June 30, 2025.

Governmental Funds
Revenues by Source



Expenditures by Function



UNION COUNTY BOARD OF EDUCATION

Capital Project Revenues by Source
Last Ten Fiscal Years

Expressed in Nominal Dollars

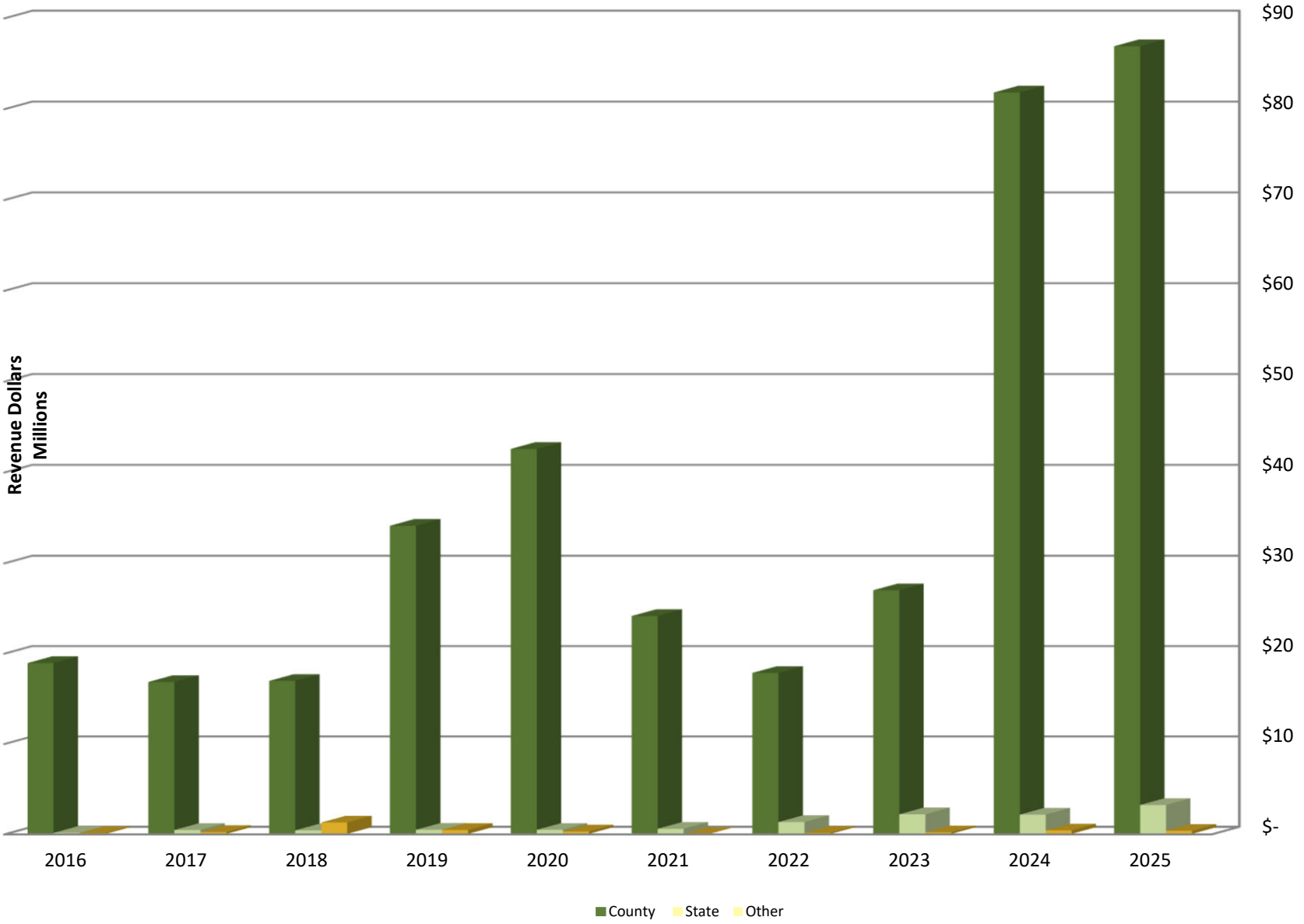
Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
County	$ 18,909,151	$ 16,814,882	$ 16,934,107	$ 34,086,582	$ 42,545,304	$ 24,113,621	$ 17,819,185	$ 26,967,076	$ 81,788,056	$ 86,881,297
State	108,905	432,676	390,534	456,440	449,980	565,854	1,311,178	2,168,758	2,129,026	3,198,358
Other	86,466	210,822	1,261,173	435,215	272,917	2,482	105,233	179,103	386,532	337,556
Totals	$ 19,104,522	$ 17,458,380	$ 18,585,814	$ 34,978,237	$ 43,268,201	$ 24,681,957	$ 19,235,596	$ 29,314,937	$ 84,303,614	$ 90,417,211

Expressed in Constant Dollars

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
County	$ 7,719,439	$ 6,672,863	$ 6,611,193	$ 13,222,257	$ 15,659,157	$ 8,137,943	$ 5,840,269	$ 8,583,457	$ 25,355,842	$ 26,934,842
State	44,459	171,704	152,467	177,054	165,619	190,966	429,741	690,303	660,038	991,551
Other	35,299	83,663	492,371	168,821	100,449	838	34,490	57,007	119,832	104,649
Totals	$ 7,799,197	$ 6,928,230	$ 7,256,031	$ 13,568,132	$ 15,925,225	$ 8,329,747	$ 6,304,500	$ 9,330,767	$ 26,135,712	$ 28,031,042

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Capital Project Revenues by Source



UNION COUNTY BOARD OF EDUCATION

Capital Project Expenditures by Function
Last Ten Fiscal Years

Expressed in Nominal Dollars

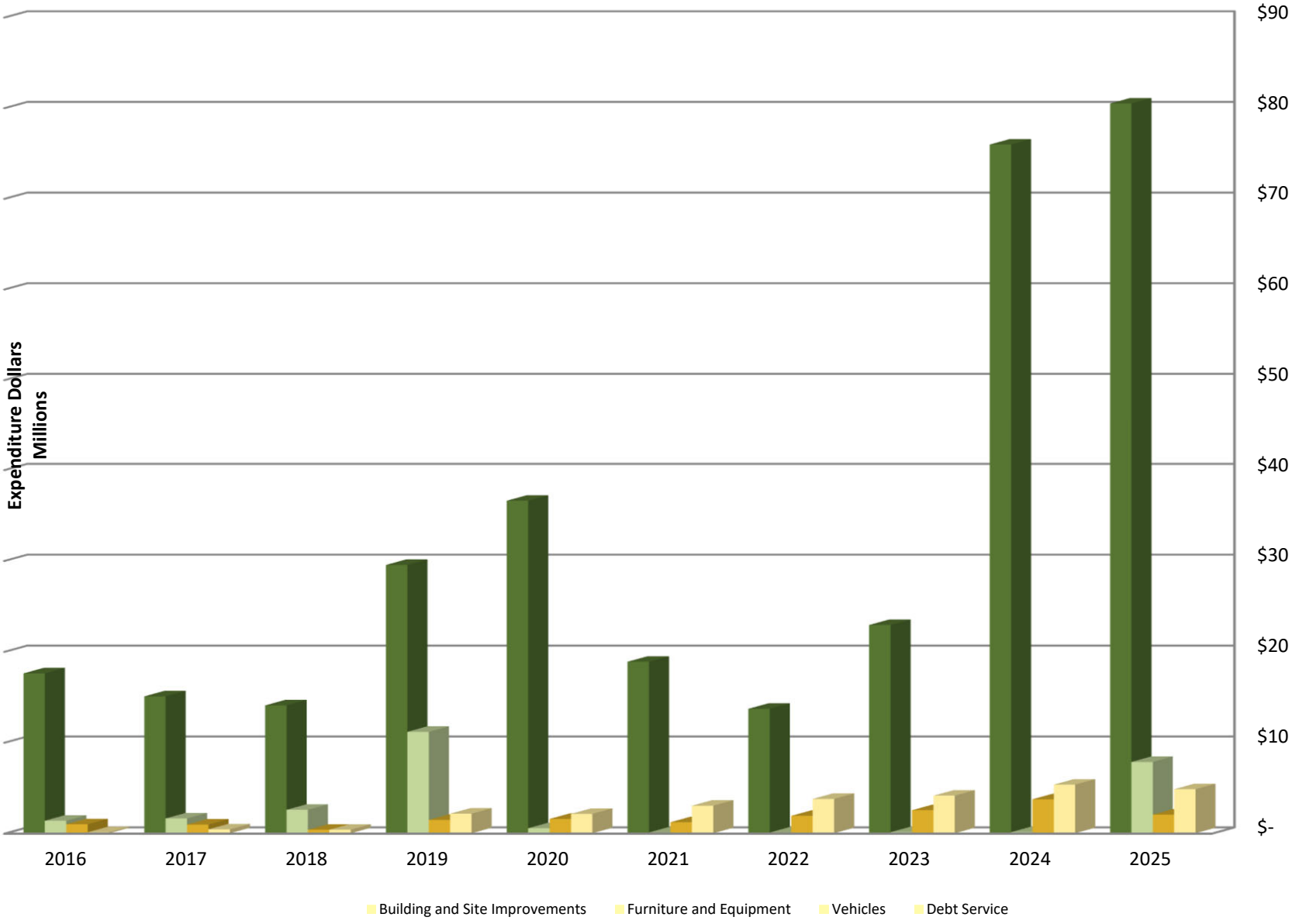
Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Building and Site Improvements	$ 17,586,500	$ 15,058,664	$ 14,066,409	$ 29,516,094	$ 36,587,479	$ 18,871,315	$ 13,692,820	$ 22,913,554	$ 75,947,202	$ 80,472,705
Furniture and Equipment	1,381,601	1,632,446	2,579,764	11,158,160	553,877	88,340	81,910	118,997	122,926	7,847,562
Vehicles	991,720	957,948	382,456	1,473,336	1,577,152	1,215,833	1,918,302	2,538,566	3,740,321	2,052,036
Debt Service	108,905	432,676	390,534	2,157,777	2,133,684	3,031,951	3,777,273	4,135,706	5,348,839	4,846,179
Totals	$ 20,068,726	$ 18,081,734	$ 17,419,163	$ 44,305,367	$ 40,852,192	$ 23,207,439	$ 19,470,305	$ 29,706,823	$ 85,159,288	$ 95,218,482

Expressed in Constant Dollars

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Building and Site Improvements	$ 7,179,482	$ 5,975,921	$ 5,491,623	$ 11,449,355	$ 13,466,330	$ 6,368,753	$ 4,487,845	$ 7,293,245	$ 23,545,067	$ 24,948,058
Furniture and Equipment	564,022	647,824	1,007,158	4,328,274	203,859	29,813	26,846	37,876	38,109	2,432,892
Vehicles	404,858	380,155	149,313	571,510	580,484	410,323	628,727	808,010	1,159,570	636,170
Debt Service	44,459	171,704	152,467	837,006	785,320	1,023,233	1,238,008	1,316,370	1,658,241	1,502,407
Totals	$ 8,192,821	$ 7,175,604	$ 6,800,561	$ 17,186,145	$ 15,035,993	$ 7,832,122	$ 6,381,426	$ 9,455,501	$ 26,400,987	$ 29,519,527

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Capital Project Expenditures by Function



UNION COUNTY BOARD OF EDUCATION

Proprietary Fund - Food Services Operations
Revenues by Source
Last Ten Fiscal Years

Expressed in Nominal Dollars

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Food Sales	$ 7,101,713	$ 6,839,980	$ 6,534,170	$ 6,600,918	$ 4,968,783	$ 939,030	$ 2,371,551	$ 7,861,668	$ 7,788,029	$ 7,594,668
Federal Reimbursements	8,472,614	8,606,855	8,329,591	7,926,468	6,671,516	7,632,912	20,463,891	11,126,920	12,082,177	11,570,900
Federal Commodities	1,085,614	1,124,910	1,163,368	979,715	1,035,123	1,195,136	1,406,629	1,319,120	1,377,816	1,232,161
Other	81,323	79,714	96,002	116,948	135,142	33,705	14,905	71,758	119,898	210,466
Totals	$ 16,741,264	$ 16,651,459	$ 16,123,131	$ 15,624,049	$ 12,810,564	$ 9,800,783	$ 24,256,976	$ 20,379,466	$ 21,367,920	$ 20,608,195

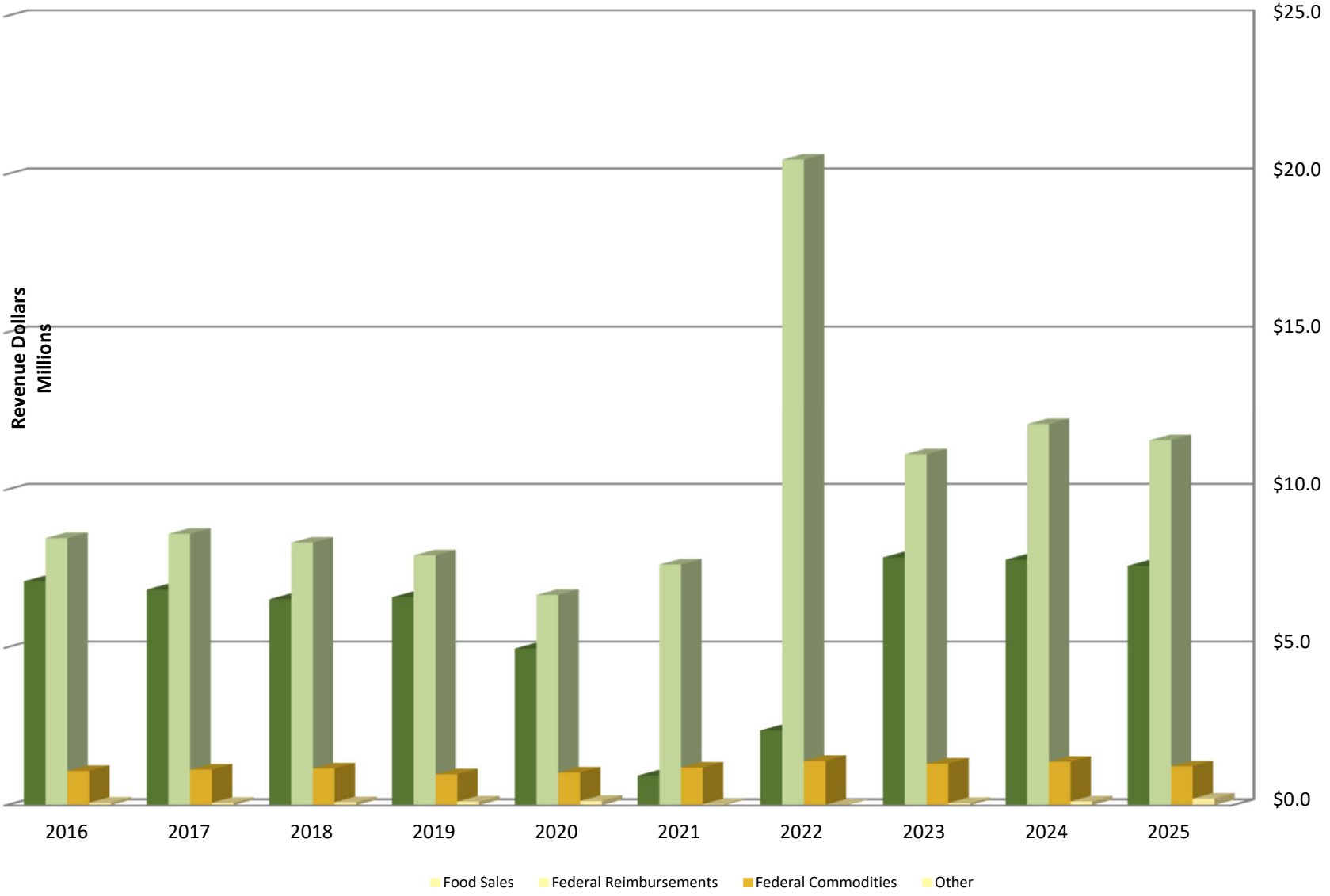
Expressed in Constant Dollars

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Food Sales	$ 2,899,191	$ 2,714,396	$ 2,550,985	$ 2,560,510	$ 1,828,802	$ 316,907	$ 777,280	$ 2,502,321	$ 2,414,436	$ 2,354,490
Federal Reimbursements	3,458,845	3,415,568	3,251,930	3,074,694	2,455,508	2,575,980	6,707,076	3,541,631	3,745,703	3,587,197
Federal Commodities	443,189	446,412	454,187	380,034	380,986	403,338	461,025	419,868	427,149	381,993
Other	33,199	31,634	37,480	45,364	49,740	11,375	4,885	22,840	37,171	65,248
Totals	$ 6,834,424	$ 6,608,010	$ 6,294,582	$ 6,060,602	$ 4,715,036	$ 3,307,600	$ 7,950,266	$ 6,486,660	$ 6,624,459	$ 6,388,928

Other revenue includes interest earned, gain on disposal of fixed assets, indirect costs not paid, and other revenue.

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Proprietary Fund - Food Services Operations
Revenues by Source



UNION COUNTY BOARD OF EDUCATION

Proprietary Fund - Food Services Operations
Expenses by Category
Last Ten Fiscal Years

Expressed in Nominal Dollars

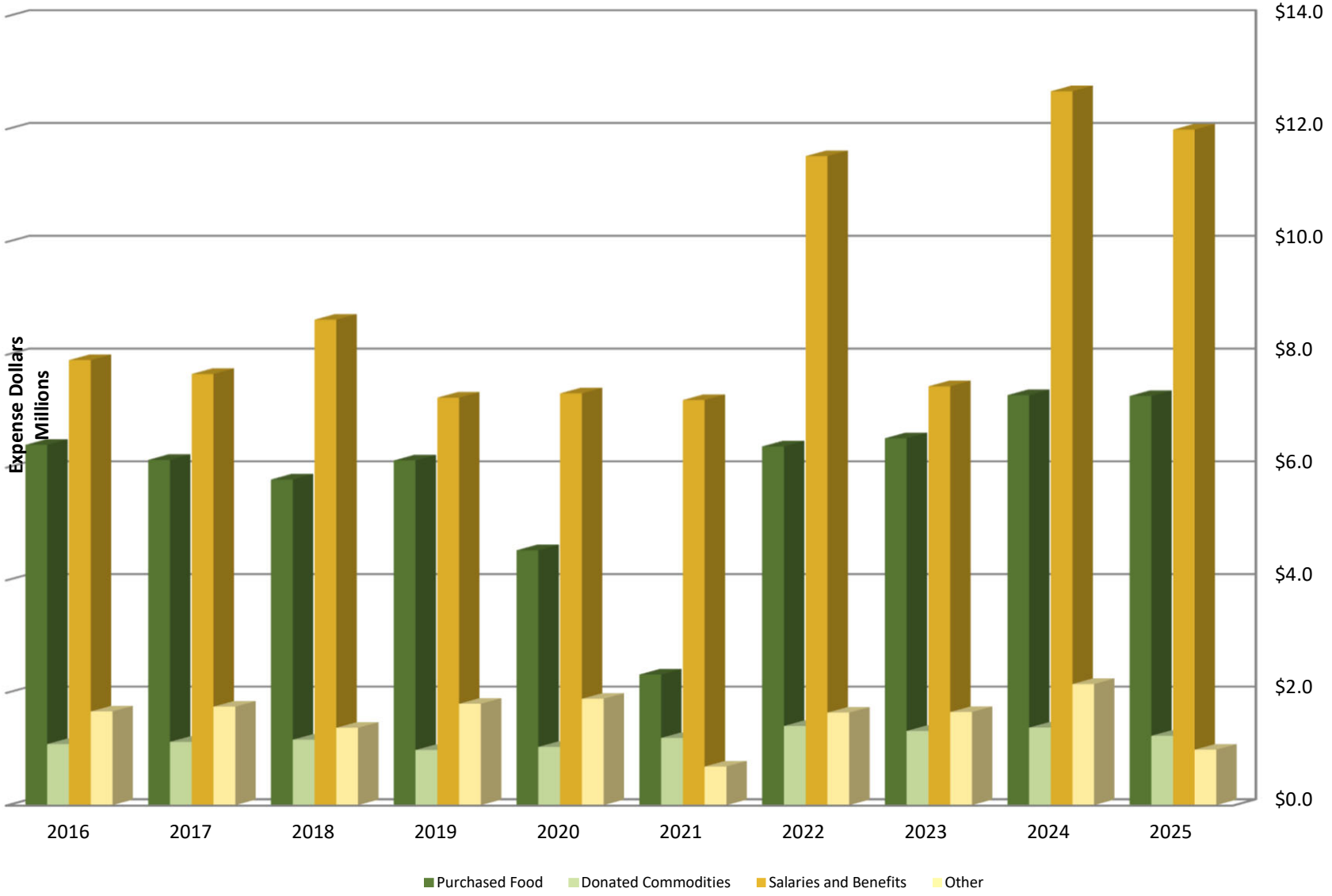
Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Purchased Food	$ 6,398,023	$ 6,131,869	$ 5,784,007	$ 6,121,769	$ 4,528,935	$ 2,321,094	$ 6,370,260	$ 6,515,375	$ 7,279,687	$ 7,265,042
Donated Commodities	1,085,614	1,124,910	1,163,368	979,715	1,035,123	1,195,136	1,406,629	1,319,120	1,377,816	1,232,161
Salaries and Benefits	7,901,401	7,654,842	8,618,371	7,235,857	7,311,434	7,193,576	11,518,511	7,436,953	12,668,999	11,988,635
Other	1,665,195	1,751,086	1,374,886	1,801,768	1,890,150	686,755	1,644,310	1,654,338	2,152,488	985,883
Totals	$ 17,050,233	$ 16,662,707	$ 16,940,632	$ 16,139,109	$ 14,765,642	$ 11,396,561	$ 20,939,710	$ 16,925,786	$ 23,478,990	$ 21,471,721

Expressed in Constant Dollars

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Purchased Food	$ 2,611,918	$ 2,433,388	$ 2,258,116	$ 2,374,647	$ 1,666,913	$ 783,330	$ 2,087,864	$ 2,073,804	$ 2,256,840	$ 2,252,300
Donated Commodities	443,189	446,412	454,187	380,034	380,986	403,338	461,025	419,868	427,149	381,993
Salaries and Benefits	3,225,654	3,037,768	3,364,672	2,806,804	2,691,035	2,427,711	3,775,212	2,367,137	3,927,629	3,716,703
Other	679,796	694,906	536,765	698,910	695,686	231,768	538,925	526,566	667,312	305,642
Totals	$ 6,960,557	$ 6,612,474	$ 6,613,740	$ 6,260,395	$ 5,434,620	$ 3,846,147	$ 6,863,026	$ 5,387,375	$ 7,278,930	$ 6,656,638

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Proprietary Fund - Food Services Operations
Expenses by Category



UNION COUNTY BOARD OF EDUCATION

Operational Expenditures Per Pupil
Expenditures by Function
Last Ten Fiscal Years

Expressed in Nominal Dollars

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Final Avg. Daily Membership	41,873	41,393	41,306	41,201	41,394	39,727	40,284	41,210	41,345	40,929
Instructional	$ 6,414	$ 6,661	$ 6,821	$ 7,580	$ 7,358	$ 7,708	$ 9,029	$ 8,651	$ 8,968	$ 8,813
Support	1,665	1,649	1,776	1,818	1,820	1,860	2,239	2,171	2,164	2,208
Ancillary	8	10	7	10	28	29	35	4	4	13
Non-programmed charges	99	153	199	218	238	271	312	329	328	370
Totals	$ 8,186	$ 8,473	$ 8,803	$ 9,626	$ 9,444	$ 9,868	$ 11,615	$ 11,155	$ 11,464	$ 11,404

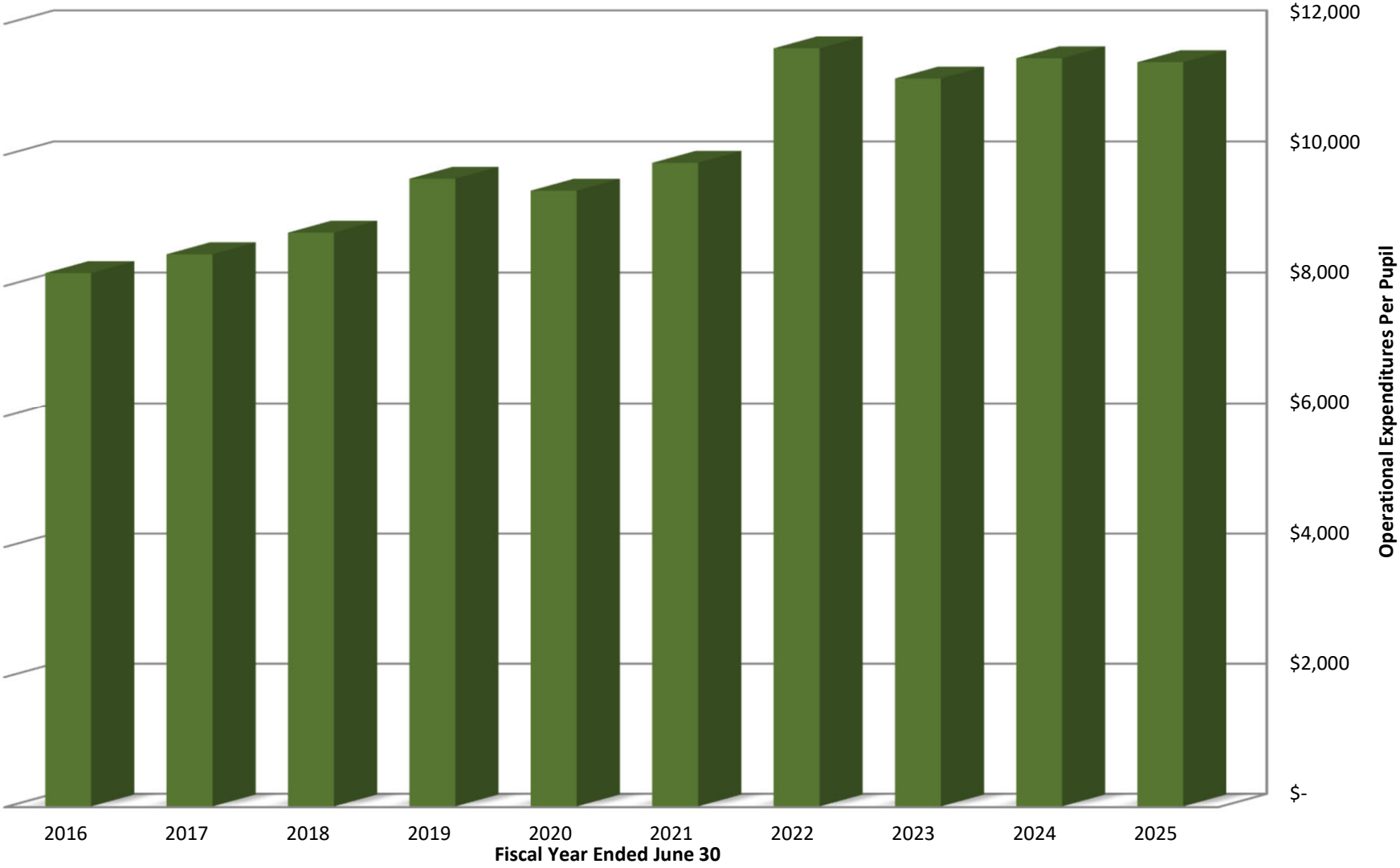
Expressed in Constant Dollars

Year ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Instructional	$ 2,618	$ 2,643	$ 2,663	$ 2,940	$ 2,708	$ 2,601	$ 2,959	$ 2,754	$ 2,780	$ 2,732
Support	680	654	693	705	670	628	734	691	671	685
Ancillary	3	4	3	4	10	10	11	1	1	4
Non-programmed charges	40	61	78	85	88	91	102	105	102	115
Totals	$ 3,341	$ 3,362	$ 3,437	$ 3,734	$ 3,476	$ 3,330	$ 3,806	$ 3,551	$ 3,554	$ 3,536

The above operational expenditures per pupil include the General, State Public School, Federal Grants, and Other Special Revenue Funds.

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Operational Expenditures Per Pupil
Expenditures by Function



Union County Board of Education
Final Average Daily Membership
Last Ten Fiscal Years



	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Final Avg. Daily Membership	41,873	41,393	41,306	41,201	41,394	39,727	40,284	41,210	41,345	40,929

UNION COUNTY BOARD OF EDUCATION

Teachers' Salaries

Last Ten Fiscal Years

Year Ended June 30	Minimum	Maximum
2025	$ 47,215	$ 80,115 *
2024	44,086	77,946 *
2023	41,916	76,566 *
2022	40,046	75,046 *
2021	38,150	72,930 *
2020	38,150	72,930 *
2019	38,150	72,930 *
2018	38,150	72,230 *
2017	38,150	70,750 **
2016	38,150	69,530 **

* Represents total salaries including both state and local supplement, but does not include the following:

(a) Bonus payments

(b) Payments of varying amounts for performing extra duties.

Note: Effective 7/1/14, teachers no longer receive longevity payments.

** Represents total salaries including both state base and the system-wide local supplement, but does not include the following:

(a) Bonus payments

(b) Payments of varying amounts for performing extra duties, and

(c) Longevity payments, ranging from 1 1/2% to 4 1/2% of the annual salary, made to each teacher for 10 or more years of service.

Source: Union County Public Schools Board of Education Payroll Data

UNION COUNTY BOARD OF EDUCATION

School Building Data

June 30, 2025

Campus	Grade Span	School Capacity	Final Avg. Daily Membership	Percentage of Capacity Used	Age (Years) of Orignial Construction	Date of Original Construction
Elementary Schools						
Antioch	K-5	757	812	107%	21	2004
Benton Heights	K-5	654	435	67%	101	1924
East	K-5	532	395	74%	75	1950
Fairview	K-5	631	397	63%	24	2001
Hemby Bridge	K-5	525	477	91%	52	1973
Indian Trail	K-5	642	605	94%	85	1940
Kensington	K-5	746	901	121%	20	2005
Marshville	K-5	460	402	87%	80	1945
Marvin	K-5	728	645	89%	23	2002
New Salem	K-5	277	249	90%	76	1949
New Town	K-5	728	684	94%	18	2007
Poplin	K-5	746	755	101%	16	2009
Porter Ridge	K-5	688	751	109%	21	2004
Prospect	K-5	494	371	75%	72	1953
Rea View	K-5	728	629	86%	18	2007
Rock Rest	K-5	538	376	70%	19	2006
Rocky River	K-5	660	519	79%	18	2007
Sandy Ridge	K-5	704	529	75%	20	2005
Sardis	K-5	525	471	90%	28	1997
Shiloh Valley ES	K-5	844	563	67%	33	1992
Shiloh Valley PS	K-5	641	546	85%	17	2008
Stallings	K-5	750	767	102%	17	2008
Union	K-5	368	301	82%	33	1992
Unionville	K-5	668	674	101%	80	1945
Walter Bickett	K-5	784	428	55%	23	2002
Waxhaw	K-5	653	584	89%	33	1992
Weddington	K-5	701	637	91%	28	1997
Wesley Chapel	K-5	575	730	127%	68	1957
Western Union	K-5	601	535	89%	70	1955
Wingate	K-5	460	370	80%	72	1953
Middle Schools						
Cuthbertson	6-8	1320	1321	100%	16	2009
East Union	6-8	1060	687	65%	73	1952
Marvin Ridge	6-8	1408	1278	91%	18	2007
Monroe	6-8	1128	805	71%	50	1975
Parkwood	6-8	984	881	90%	50	1975
Piedmont	6-8	988	977	99%	50	1975
Porter Ridge	6-8	1454	1452	100%	20	2005
Sun Valley	6-8	1180	914	77%	50	1975
Weddington	6-8	1216	1326	109%	27	1998

UNION COUNTY BOARD OF EDUCATION

School Building Data (Continued)

June 30, 2025

Campus	Grade Span	School Capacity	Final Avg. Daily Membership	Percentage of Capacity Used	Age of Orignial Construction	Date of Original Construction
High Schools						
Cuthbertson	9-12	1794	1857	104%	16	2009
Early College[1]	9-13	N/A	336	N/A	N/A	N/A
Forest Hills	9-12	1448	967	67%	65	1960
Marvin Ridge	9-12	1848	1959	106%	18	2007
Monroe	9-12	1440	1199	83%	65	1960
Parkwood	9-12	1376	1083	79%	64	1961
Piedmont	9-12	1600	1265	79%	65	1960
Porter Ridge	9-12	1812	1794	99%	20	2005
Sun Valley	9-12	1614	1264	78%	65	1960
Weddington	9-12	1794	1901	106%	25	2000
Alternative Schools						
Central Academy	9-12	1504	873	58%	50	1975
South Providence	6-12	140	83	59%	83	1942
Wolfe Develop. Center/ Trainable School	K-12	140	110	79%	16	2009

N/A = Not Applicable

Source: Union County Public Schools N. C. Public Schools Facility Needs Report; 2025

Note:

(1) Early College is located at South Piedmont Community College

UNION COUNTY BOARD OF EDUCATION

Ratios of Outstanding Debt by Type
Last Ten Fiscal Years

Year Ended June 30	Capitalized Leases	Installment Purchases	Total Primary Government	Percentage of Personal Income	Per Capita
2025	$ -	$ 13,547,730	$ 13,547,730	N/A	$ 51
2024	-	13,074,590	13,074,590	N/A	49
2023	-	15,642,000	15,642,000	0.08%	61
2022	-	4,530,264	4,530,264	0.03%	18
2021	-	6,272,335	6,272,335	0.04%	25
2020	-	8,267,380	8,267,380	0.05%	34
2019	-	6,735,849	6,735,849	0.05%	28
2018	-	630,021	630,021	0.00%	12
2017	-	1,020,555	1,020,555	0.01%	4
2016	-	495,283	495,283	0.00%	2

N/A = Not available

Source: Union County Board of Education, North Carolina, Annual Financial Report for the year ended June 30, 2025.

Note: This table is a ten year schedule. However, county level annual income data is not released by the U.S. Bureau of Economic Analysis until the month of April, and is always two years behind. Therefore, June 30, 2025 and June 30, 2024 income based information will be shown above as "N/A", and the June 30, 2024 information will be reported for the year ended June 30, 2026, if applicable.

Union County
North Carolina
Governmental Funds Revenues by Source
Last Ten Fiscal Years

Expressed in Nominal Dollars

Fiscal Year Ended June 30	Ad Valorem Taxes	Other Taxes	Inter-Governmental Revenues	Licenses and Permits	Sales and Service	Investment Earnings	Miscellaneous	Total
2025	$ 265,480,362	$ 81,738,248	$ 56,600,690	$ 7,138,149	$ 8,707,436	$ 14,347,766	$ 14,372,088	$ 448,384,739
2024	251,588,359	79,550,774	55,738,240	5,391,603	6,752,600	21,739,972	15,380,451	436,141,999
2023	240,745,881	78,365,081	69,741,940	5,843,350	6,223,783	10,695,931	12,268,703	423,884,669
2022	230,583,439	75,417,694	53,207,574	7,616,113	9,026,258	(984,026)	9,932,134	384,799,186
2021	216,861,127	63,865,032	52,634,253	6,976,032	4,809,935	18,714	9,976,311	355,141,404
2020	205,018,769	54,196,471	38,003,442	8,596,860	5,749,023	4,609,079	8,182,913	324,356,557
2019	200,033,303	51,043,188	36,880,791	7,372,469	6,546,595	4,764,823	13,543,304	320,184,473
2018	205,544,367	47,864,360	34,516,783	7,862,126	5,914,930	1,824,378	7,377,686	310,904,630
2017	195,274,372	46,480,879	36,527,796	7,227,386	4,599,967	451,706	7,583,456	298,145,562
2016	192,395,861	40,556,654	33,831,925	7,472,415	5,173,794	867,318	7,145,607	287,443,574

Expressed in Constant Dollars

Fiscal Year Ended June 30	Ad Valorem Taxes	Other Taxes	Inter-Governmental Revenues	Licenses and Permits	Sales and Service	Investment Earnings	Miscellaneous	Total
2025	$ 82,303,925	$ 25,340,400	$ 17,547,283	$ 2,212,961	$ 2,699,470	$ 4,448,078	$ 4,455,619	$ 139,007,735
2024	77,997,141	24,662,242	17,279,907	1,671,499	2,093,433	6,739,802	4,768,230	135,212,254
2023	76,627,956	24,943,131	22,198,437	1,859,903	1,980,992	3,404,450	3,905,054	134,919,923
2022	75,574,119	24,718,279	17,438,874	2,496,194	2,958,372	(322,516)	3,255,274	126,118,596
2021	73,186,998	21,553,379	17,763,179	2,354,294	1,623,273	6,316	3,366,838	119,854,276
2020	75,458,884	19,947,467	13,987,487	3,164,147	2,115,976	1,696,410	3,011,790	119,382,161
2019	77,593,340	19,799,760	14,306,137	2,859,796	2,539,438	1,848,285	5,253,476	124,200,232
2018	80,245,943	18,686,577	13,475,591	3,069,428	2,309,230	712,250	2,880,300	121,379,319
2017	77,493,213	18,445,598	14,495,790	2,868,136	1,825,463	179,256	3,009,439	118,316,896
2016	78,543,349	16,556,777	13,811,486	3,050,526	2,112,141	354,072	2,917,110	117,345,461

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Source: Union County, North Carolina, Comprehensive Annual Financial Report for the year ended June 30, 2025.

Union County
North Carolina
Governmental Funds Expenditures by Function
Last Ten Fiscal Years

Expressed in Nominal Dollars

Fiscal Year Ended June 30	General Government	Public Safety	Capital Outlay	Economic & Physical Development	Human Services	Education	Culture and Recreation	Debt Service	Total
2025	$ 35,167,170	$ 104,787,519	$ 108,586,058	$ 9,304,462	$ 62,372,846	$ 135,650,077	$ 10,228,246	$ 58,222,644	$ 524,319,022
2024	38,764,658	96,925,579	110,730,289	4,987,188	59,920,506	127,350,720	9,530,012	51,138,019	399,346,971
2023	34,581,334	90,896,342	47,992,142	5,180,105	59,508,046	121,632,240	7,906,109	49,603,377	417,299,695
2022	31,058,589	77,954,992	55,984,248	6,032,724	55,889,295	115,534,483	7,471,269	49,709,511	399,635,111
2021	26,398,132	70,546,972	49,078,618	4,640,342	55,430,052	112,899,751	6,690,573	50,024,597	375,709,037
2020	18,002,109	71,873,105	69,294,756	4,601,843	47,910,610	106,102,982	7,332,683	38,995,665	364,113,753
2019	14,665,382	67,937,224	59,785,746	4,534,087	45,941,860	103,194,389	8,027,154	57,195,352	361,281,194
2018	13,381,265	62,734,029	34,419,297	3,322,030	43,083,568	99,713,171	7,597,933	45,556,806	309,808,099
2017	13,165,184	57,008,242	39,935,681	2,813,512	43,900,232	97,247,541	6,888,443	45,859,147	306,817,982
2016	12,344,165	52,681,383	23,343,138	2,629,698	41,848,033	94,996,333	6,579,913	47,814,441	282,237,104

Expressed in Constant Dollars

Fiscal Year Ended June 30	General Government	Public Safety	Capital Outlay	Economic & Physical Development	Human Services	Education	Culture and Recreation	Debt Service	Total
2025	$ 10,902,487	$ 32,486,109	$ 33,663,728	$ 2,884,559	$ 19,336,760	$ 42,054,085	$ 3,170,949	$ 18,050,119	$ 162,548,796
2024	12,017,776	30,048,759	34,328,480	1,546,122	18,576,488	39,481,128	2,954,484	15,853,751	127,109,723
2023	11,007,029	28,931,755	15,275,608	1,648,796	18,941,051	38,714,805	2,516,467	15,788,455	136,770,693
2022	10,179,506	25,549,883	18,348,934	1,977,236	18,317,813	37,866,626	2,448,721	16,292,378	134,870,157
2021	8,908,927	23,808,422	16,563,212	1,566,038	18,706,714	38,101,775	2,257,956	16,882,464	138,282,874
2020	6,625,828	26,453,501	25,504,518	1,693,747	17,633,903	39,052,096	2,698,856	14,352,683	141,240,493
2019	5,688,733	26,352,992	23,191,017	1,758,782	17,820,944	40,029,321	3,113,750	22,186,198	141,046,679
2018	5,224,138	24,491,799	13,437,532	1,296,944	16,820,123	38,928,712	2,966,286	17,785,692	122,945,088
2017	5,224,507	22,623,306	15,848,184	1,116,522	17,421,487	38,591,979	2,733,628	18,198,869	125,254,835
2016	5,039,360	21,506,555	9,529,562	1,073,543	17,083,968	38,781,137	2,686,172	19,519,684	117,092,369

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Source: Union County, North Carolina, Comprehensive Annual Financial Report for the year ended June 30, 2025.

Union County

Property Tax Levies and Current Collections
Last Ten Fiscal Years

Expressed in Nominal Dollars

Fiscal Year Ended June 30	Total Tax Levy	Current Tax Collections	Percent of Levy Collected
2025	$ 245,681,439	$ 245,837,359	100.1%
2024	235,976,975	236,177,952	100.1%
2023	225,973,933	225,998,455	100.0%
2022	216,861,058	216,770,532	100.0%
2021	204,482,872	204,496,057	100.0%
2020	197,546,817	196,786,125	99.6%
2019	192,056,954	191,557,613	99.7%
2018	198,297,575	197,993,083	99.8%
2017	188,432,411	187,912,101	99.7%
2016	184,680,886	184,123,235	99.7%

Expressed in Constant Dollars

Fiscal Year Ended June 30	Total Tax Levy	Current Tax Collections
2025	$ 76,165,885	$ 76,214,223
2024	73,157,318	73,219,624
2023	71,926,134	71,933,940
2022	71,076,585	71,046,915
2021	69,009,545	69,013,994
2020	72,708,769	72,428,790
2019	74,499,298	74,305,602
2018	77,416,746	77,297,870
2017	74,778,030	74,571,549
2016	75,393,801	75,166,147

Nominal dollars reflect actual dollars of the period of the transaction. Constant dollars reflect dollars having a constant general purchasing power as shown by the Consumer Price Index for All Urban Consumers (CPI-U) (Calendar years 1982-1984 = 100).

Source: Union County, North Carolina, Comprehensive Annual Financial Report for the year ended June 30, 2025.

Union County
North Carolina
Demographic Statistics
Last Ten Fiscal Years

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Population (1)	220,546	224,029	231,366	237,477	239,859	242,657	247,058	254,070	257,682	266,672
Per Capita Income (2)	$ 47,729	$ 49,709	$ 51,802	$ 53,417	$ 56,820	$ 64,609	$ 69,515	$ 72,553	N/A	N/A
Retail Sales (5) (000's omitted)	$ 1,799,712	$ 2,018,468	$ 2,068,107	$ 2,191,524	$ 2,326,821	$ 2,869,555	$ 3,381,460	$ 3,652,424	$ 3,749,152	$ 3,868,325
Final Avg. Daily Membership (3)	41,873	41,393	41,306	41,201	41,394	39,727	40,284	41,210	41,345	40,929
Unemployment Rate (4)	4.3%	4.0%	3.6%	3.9%	7.2%	4.0%	3.5%	3.1%	3.6%	3.4%

N/A = Not Available

Sources:

(1) North Carolina Demographic Unit

(2) United States Dept of Commerce. Bureau of Economic Analysis

(3) State Board of Education and DPI

(4) North Carolina Employment Security Commission

(5) North Carolina Department of Revenue

Source: Union County, North Carolina, Comprehensive Annual Financial Report for the year ended June 30, 2025.

Union County, North Carolina
Top Ten Principal Taxpayers
For Year Ended June 30, 2025

Taxpayer	Type of Business	June 30, 2025 Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value	June 30, 2016 Taxable Assessed Value	Rank	Percentage of Total Taxable Assessed Value
Allegheny Technologies, Inc.	Metals	$ 377,006,435	1	0.90%	$ 169,714,793	1	0.71%
Duke Energy Carolinas, LLC	Utility	204,903,607	2	0.49%	91,881,838	3	0.39%
Charlotte Pipe & Foundry Company	Manufacturing	199,099,787	3	0.48%	85,170,662	4	0.36%
Union Electric Membership Corp	Utility	183,306,428	4	0.44%	127,908,599	2	0.54%
Piedmont Natural Gas Co. Inc.	Utility	115,791,916	5	0.28%	57,112,580	5	0.24%
Goulston Technologies, Inc.	Manufacturing	78,160,272	6	0.19%	-	-	-
AMH NC Properties LP	Home Rentals	76,227,400	7	0.18%	-	-	-
Harris Teeter, LLC 2300	Retail	73,856,796	8	0.18%	-	-	-
Utility Lines Construction Services	Utility	72,872,260	9	0.17%	-	-	-
Consolidated Metco, Inc.	Manufacturing	69,468,401	10	0.17%	-	-	-
Indian American Monroe Poplin	Retail	-		-	31,324,500	8	0.13%
TDY Industries, Inc.	Manufacturing	-		-	30,456,100	9	0.13%
CSX Transportation	Utility	-		-	27,719,304	10	0.12%
Wal-Mart Real Estate Business	Retail	-		-	41,593,400	7	0.17%
AEP Industries, Inc.	Manufacturing	-		-	42,470,771	6	0.17%
		$ 1,450,693,302		3.48%	$ 705,352,547		2.96%
Total County-Wide Assessed Valuation		$ 41,786,853,641			$ 23,796,785,051		

Source: Union County, North Carolina Comprehensive Annual Financial Report for the year ended June 30, 2025.

Union County, North Carolina
Property Tax Rates - All Overlapping Governments
(Per $100 of Assessed Value)
Last Ten Fiscal Years

Fiscal Year Ended June 30	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Union County										
County-wide rate	0.7765	0.7665	0.7810	0.7309	0.7309	0.7309	0.5880	0.5880	0.5880	0.5880
Supplemental School Districts										
(Approved by the Voters)										
Monroe Schools District	-	-	-	-	-	-	-	-	-	-
County Schools District	-	-	-	-	-	-	-	-	-	-
Supplemental Fire Districts										
Allens Crossroads VFD	-	-	-	-	-	0.0838	0.0700	0.0689	0.0689	0.0800
Bakers VFD	-	-	-	-	-	0.0531	0.0335	0.0343	0.0522	0.0638
Beaver Lane VFD	-	-	-	-	-	0.0843	0.0644	0.0671	0.0671	0.0736
Fairview VFD	-	-	-	-	-	0.0517	0.0510	0.0503	0.0503	0.0605
Griffith VFD	-	-	-	-	-	0.0507	0.0215	0.0200	0.0200	0.0229
Hemby VFD	0.0512	0.0485	0.0503	0.0488	0.0488	0.0487	0.0441	0.0441	0.0441	0.0512
Jackson VFD	-	-	-	-	-	0.0404	0.0288	0.0399	0.0399	0.0502
Lanes Creek VFD	-	-	-	-	-	0.0792	0.0568	0.0546	0.0546	0.0658
New Salem VFD	-	-	-	-	-	0.0569	0.0396	0.0384	0.0384	0.0588
Providence VFD	-	-	-	-	-	0.0392	0.0361	0.0375	0.0375	-
Sandy Ridge VFD	-	-	-	-	-	0.0584	0.0385	0.0329	0.0329	0.0371
Springs VFD	0.0474	0.0437	0.0567	0.0552	0.0552	0.0403	0.0422	0.0464	0.0464	0.0552
Stack VFD	-	-	-	-	-	0.0611	0.0455	0.0348	0.0348	0.0508
Stallings VFD	0.0509	0.0503	0.0503	0.0502	0.0502	0.0548	0.0472	0.0478	0.0478	0.0535
Unionville VFD	-	-	-	-	-	0.0451	0.0616	0.0614	0.0614	0.0677
Waxhaw VFD	0.0380	0.0357	0.0413	0.0545	0.0545	0.0526	0.0403	0.0419	0.0419	0.0523
Wesley Chapel VFD	0.0282	0.0293	0.0293	0.0354	0.0354	0.0392	0.0361	0.0375	0.0375	0.0398
Wingate VFD	-	-	-	-	-	0.0817	0.0633	0.0670	0.0670	0.0855
Total County Rates										
Maximum	0.8277	0.8168	0.8377	0.7861	0.7861	0.8152	0.6524	0.6551	0.6551	0.6616
Minimum	0.7765	0.7665	0.7810	0.7309	0.7309	0.7309	0.5880	0.5880	0.5880	0.5880
Average	0.8021	0.7917	0.8094	0.7585	0.7585	0.7731	0.6202	0.6216	0.6216	0.6248
Cities and Towns										
City of Monroe	0.5863	0.5863	0.5863	0.6163	0.6163	0.6163	0.5025	0.5025	0.5025	0.5025
Downtown Monroe District	0.2190	0.2190	0.2190	0.2190	0.2190	0.2190	0.1950	0.1950	0.1950	0.1950
Town of Fairview	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200
Town of Indian Trail	0.1850	0.1850	0.1850	0.1850	0.1850	0.1850	0.1850	0.1850	0.1850	0.1850
Town of Marshville	0.4800	0.4800	0.5100	0.5100	0.5100	0.5100	0.4900	0.4900	0.4900	0.5500
Town of Mineral Springs	0.0250	0.0250	0.0250	0.0250	0.0250	0.0250	0.0210	0.0210	0.0210	0.0210
Town of Mint Hill	-	-	-	-	-	-	-	-	-	-
Town of Stallings	0.2150	0.2150	0.2150	0.2150	0.2150	0.2150	0.1860	0.1860	0.1860	0.2160
Town of Unionville	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200	0.0200
Town of Waxhaw	0.3600	0.3600	0.3600	0.3900	0.3850	0.3850	0.3850	0.3850	0.3850	0.3850
Town of Weddington	0.0520	0.0520	0.0520	0.0520	0.0520	0.0520	0.0480	0.0480	0.0450	0.0250
Town of Wingate	0.4200	0.4200	0.4300	0.4300	0.4300	0.4300	0.3400	0.3400	0.3400	0.3400
Village of Lake Park	0.2300	0.2300	0.2300	0.2400	0.2500	0.2500	0.1900	0.2025	0.2025	0.2125
Village of Marvin	0.0500	0.0500	0.0500	0.0500	0.0500	0.0600	0.0600	0.0600	0.0600	0.0800
Village of Wesley Chapel	0.0165	0.0165	0.0165	0.0165	0.0165	0.0165	0.0129	0.0129	0.0129	0.0165

Source: Union County, North Carolina, Comprehensive Annual Financial Report for the year ended June 30, 2025.

Source: Union County Tax Assessor's Office

Union County, North Carolina
Operating Indicators by Function/Program
Last Ten Fiscal Years

	Fiscal Year Ended									
	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Governmental activities:										
General government										
Personnel										
Number of full-time employees	864	864	898	951	1,013	1,048	1,123	1,256	1,155	1,189
Number of part-time employees	72	98	106	157	159	123	82	187	153	152
Elections										
Number of registered voters	145,645	148,448	154,300	150,789	160,261	159,957	168,355	173,272	180,072	177,104
Information Systems (and GIS)										
Number of people in system	1,242	1,257	1,883	1,772	1,815	1,828	1,346	1,501	1,577	1,617
General Services										
Number of vehicle service requests	4,501	4,629	4,462	4,552	4,518	4,683	4,491	4,928	5,095	4,089
Public safety										
Fire Services										
Number of volunteer fire personnel	500	500	500	500	500	500	500	985	985	985
Inspection										
Number of inspections	1,106	906	1,172	1,798	1,375	1,079	2,448	2,587	2,366	3,006
Human services										
Public Health										
Number of patients	6,786	10,198	8,904	6,497	4,382	3,664	11,031	4,744	6,898	6,969
Number of visits	15,716	17,508	15,099	12,728	10,667	9,211	18,110	11,246	12,421	13,737
Social Services										
Number of client visits	47,064	53,125	58,693	58,803	44,275	50,589	46,354	19,976	57,989	58,847
Transportation and Nutrition										
Number of trips	74,176	75,342	69,402	79,674	1,417	67,437	71,335	75,784	78,105	82,936
Congregate, home delivered and supplemental meals	70,497	75,134	71,963	66,978	101,619	146,204	138,263	117,750	83,555	68,298
Veterans' Services										
Number of visitors	3,652	3,576	3,556	3,628	3,048	1,956	2,072	2,293	2,179	1,907
Number of phone calls	12,166	11,047	11,215	12,472	12,464	11,336	9,652	11,157	8,870	7,974
Cultural and recreational										
Library										
Number of volumes	207,748	190,370	166,742	145,582	149,573	145,944	133,872	139,443	155,165	140,168
Education										
Number of licensed employees	3,054	3,019	2,603	3,111	3,117	2,873	2,819	2,786	2,646	2,660
Final Avg. Daily Membership	41,873	41,393	41,500	41,201	41,394	39,727	40,284	41,210	41,345	40,929
Business-type activities:										
Water and Sewer										
Average daily consumption in gallons (in 000's)	13,100	13,880	13,870	14,160	14,228	14,206	15,020	15,140	15,740	15,210
Number of water service connections	46,236	47,489	49,363	50,509	51,961	53,537	55,315	56,789	57,274	58,061
Number of sewer service connections	33,632	34,711	36,402	37,319	38,834	40,169	41,742	43,002	43,587	44,389

Source: Union County, North Carolina, Annual Financial Report for the year ended June 30, 2025.

Union County, North Carolina
Capital Asset Statistics by Function/Program
Last Ten Fiscal Years

	Fiscal Year Ended									
	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Governmental activities:										
Tax Administration										
Number of tax parcels	113,574	118,525	117,378	118,431	125,580	133,457	127,632	108,877	132,603	132,618
Elections										
Number of precincts	52	52	52	52	52	52	52	52	54	54
Public safety										
Law Enforcement (and AC)										
Number of stations	8	8	8	8	8	8	8	8	8	8
Number of patrol units	332	335	278	284	299	299	307	313	323	338
Fire Services										
Number of stations-main	17	17	17	17	17	17	17	17	16	17
Number of stations-sub	8	8	8	8	8	8	8	9	9	10
Cultural and recreational										
Library										
Number of libraries	4	4	4	4	4	4	4	4	4	4
Parks and Recreation										
Number of parks	3	3	3	3	3	3	3	3	3	3
Number of acres in parks	1,290	1,290	1,290	1,290	1,290	1,290	1,290	1,290	1,290	1,290
Number of acres in lakes	350	350	350	350	350	350	350	350	350	350
Education										
Number of schools	53	53	53	53	53	53	53	53	53	53
Number of classrooms	1,914	2,379	2,075	2,084	2,084	2,084	2,084	2,084	2,094	2,300
Business-type activities:										
Water and Sewer										
Number of fire hydrants	4,843	4,964	5,041	5,096	5,189	5,279	5,528	5,677	5,666	5,782
Miles of water mains	1,043	1,065	1,082	1,095	1,114	1,132	1,119	1,141	1,174	1,217
Miles of sewer mains	663	684	698	708	727	741	736	758	772	709

Source: Union County, North Carolina, Annual Financial Report for the year ended June 30, 2025.

Union County
North Carolina
Principal Employers
For Year Ended June 30, 2025 and 2016

	2025			2016		
Employer[2]	Employees [2]	Rank	Approximate Percentage of Total County Employment	Employees	Rank	Approximate Percentage of Total County Employment
Union County Schools	1,000+	1	1%+	1,000+	1	1%+
County of Union	1,000+	2	1%+	1,000+	5	1%+
Tyson Farms, Inc.	1,000+	3	1%+	1,000+	2	1%+
ATI Specialty Materials LLC	1,000+	4	1%+	-	-	-
Harris Teeter	1,000+	5	1%+	1,000+	4	1%+
Utility Lines Construction	1,000+	6	1%+	-	-	-
Wingate University	1,000+	7	1%+	-	-	-
Wal-Mart Associates, Inc.	500 - 999	8	<1%	500 - 999	6	<1%
City of Monroe	500 - 999	9	<1%	500 - 999	8	<1%
Atrium Health	500 - 999	10	<1%	-	-	-
TDY Industries	-	-	-	1,000+	3	1%+
Pilgrims Pride Corporation	-	-	-	500 - 999	7	<1%
Unicon, Inc.	-	-	-	500 - 999	9	<1%
Scott Technologies, Inc.	-	-	-	500 - 999	10	<1%
			10%+			10%+
Total County Employment [1]	130,238			106,760		

Sources:
(1) Labor estimates provided by the Employment Security Commission of North Carolina as of June 30th each year.
(2) North Carolina Chamber of Commerce - data is for the 4th quarter of the preceding year.

Union County
North Carolina
Ratios of Outstanding Debt by Type
Last Ten Fiscal Years

	Governmental Activities			Business -Type Activities						
Year Ended June 30	General Obligation Debt	C.O.P.'s and Installment Financing	Total Governmental Activities	General Obligation Debt	Revenue Bonds	Other Long-term Obligations	Total Business-type Activities	Total Primary Government	Percentage of Personal Income	Per Capita
2025	$ 389,444,622	$ 26,510,532	$ 415,955,154	$ -	$ 437,419,593	$ -	$ 437,419,593	853,374,747	N/A	$3,225
2024	426,999,703	32,223,384	459,223,087	-	451,070,387	-	451,070,387	910,293,474	N/A	3,558
2023	458,427,030	37,918,794	496,345,824	-	464,156,181	-	464,156,181	960,502,005	N/A	3,794
2022	336,037,179	44,662,934	380,700,113	-	476,711,975	-	476,711,975	857,412,088	N/A	3,472
2021	347,174,304	50,425,820	397,600,124	-	482,992,769	-	482,992,769	880,592,893	N/A	3,629
2020	380,695,049	50,249,706	430,944,755	-	160,269,930	-	160,269,930	591,214,685	4.30%	2,465
2019	273,169,328	55,808,592	328,977,920	-	194,866,255	6,750,000	201,616,255	530,594,175	4.20%	2,234
2018	314,233,363	62,571,111	376,804,474	-	121,096,288	7,500,000	128,596,288	505,400,762	4.20%	2,184
2017	289,513,224	69,396,598	358,909,822	-	60,021,984	8,250,000	68,271,984	427,181,806	3.80%	1,907
2016	318,941,151	76,303,778	395,244,929	-	62,627,835	9,233,697	71,861,532	467,106,461	5.10%	2,118

N/A = Not Available

Source: Union County, North Carolina, Annual Financial Report for the year ended June 30, 2025.

Note: This table is a ten year schedule. However, county level annual income data is not released by the U.S. Bureau of Economic Analysis until the month of April, and is always two years behind. Therefore, June 30, 2025 and June 30, 2024 income based information will be shown above as "N/A", and the June 30, 2024 information will be reported for the year ended June 30, 2026, if applicable.

Compliance Section

Report on Internal Control Over Financial Reporting and on Compliance and Other Matters
Based on an Audit of Financial Statements Performed in Accordance
with *Government Auditing Standards*

INDEPENDENT AUDITORS' REPORT

To the Union County Board of Education
Monroe , North Carolina

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to the financial audits contained in Government Auditing Standards issued by the Comptroller General of the United States, the accompanying financial statements of the governmental activities, the business-type activities and each major fund of Union County Board of Education, North Carolina, as of and for the year ended June 30, 2025, and the related notes to the basic financial statements, which collectively comprises the Union County Board of Education, North Carolina's basic financial statements and have issued our report thereon dated December 17, 2025.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Union County Board of Education's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Board's internal control. Accordingly, we do not express an opinion on the effectiveness of the Board's internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A material weakness is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over financial reporting was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider material weaknesses. However, material weaknesses or significant deficiencies may exist that have not been identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Union County Board of Education's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Anderson Smith & Wike PLLC

December 17, 2025
West End, North Carolina

INDEPENDENT AUDITORS' REPORT

Report On Compliance for Each Major Federal Program and Report on
Internal Control Over Compliance Required by the Uniform Guidance and the State Single Audit Implementation Act

To the Union County Board of Education
Monroe , North Carolina

Report on Compliance for Each Major Federal Program

Opinion on Each Major Federal Program

We have audited Union County Board of Education, North Carolina's compliance with the types of compliance requirements identified as subject to audit in the OMB *Compliance Supplement* and the *Audit Manual for Governmental Auditors in North Carolina*, issued by the Local Government Commission, that could have a direct and material effect on each of the Board's major federal programs for the year ended June 30, 2025. The Union County Board of Education's major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, the Union County Board of Education complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2025.

Basis for Opinion on Each Major Federal Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance) and the State Single Audit Implementation Act. Our responsibilities under those standards, the Uniform Guidance and the State Single Audit Implementation Act are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report. We are required to be independent of Union County Board of Education and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a reasonable basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the Union County Board of Education's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to Union County Board of Education's federal programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on Union County Board of Education's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, the Uniform Guidance and the State Single Audit Implementation Act will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about Union County Board of Education's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, the Uniform Guidance and the State Single Audit Implementation Act, we

- exercise professional judgment and maintain professional skepticism throughout the audit.
- identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding Union County Board of Education's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- obtain an understanding of Union County Board of Education's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance and the State Single Audit Implementation Act, but not for the purpose of expressing an opinion on the effectiveness of Union County Board of Education's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control Over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance and the State Single Audit Implementation Act. Accordingly, this report is not suitable for any other purpose.

Anderson Smith & Wike PLLC

December 17, 2025
West End, North Carolina

INDEPENDENT AUDITORS' REPORT

Report On Compliance for Each Major State Program and Report on
Internal Control Over Compliance Required by the Uniform Guidance and the State Single Audit Implementation Act

To the Union County Board of Education
Monroe , North Carolina

Report on Compliance for Each Major State Program

Opinion on Each Major State Program

We have audited Union County Board of Education, North Carolina's compliance with the types of compliance requirements described in the OMB *Compliance Supplement* and *Audit Manual for Governmental Auditors in North Carolina*, issued by the Local Government Commission that could have a direct and material effect on each of the Board's major State programs for the year ended June 30, 2025. The Union County Board of Education's major State programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

In our opinion, the Union County Board of Education complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major State programs for the year ended June 30, 2025.

Basis for Opinion on Each Major State Program

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); and applicable sections of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance) as described in the *Audit Manual for Governmental Auditors in North Carolina*, and the State Single Audit Implementation Act. Our responsibilities under those standards, the Uniform Guidance and the State Single Audit Implementation Act are further described in the Auditor's Responsibilities for the Audit of Compliance section of our report. We are required to be independent of Union County Board of Education and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a reasonable basis for our opinion on compliance for each major State program. Our audit does not provide a legal determination of the Union County Board of Education's compliance with the compliance requirements referred to above.

Responsibilities of Management for Compliance

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to Union County Board of Education's State programs.

Auditor's Responsibilities for the Audit of Compliance

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on Union County Board of Education's compliance based on our audit. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS, *Government Auditing Standards*, the Uniform Guidance and the State Single Audit Implementation Act will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about Union County Board of Education's compliance with the requirements of each major State program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards*, the Uniform Guidance and the State Single Audit Implementation Act, we

- exercise professional judgment and maintain professional skepticism throughout the audit.
- identify and assess the risks of material noncompliance, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding Union County Board of Education's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- obtain an understanding of Union County Board of Education's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance and the State Single Audit Implementation Act, but not for the purpose of expressing an opinion on the effectiveness of Union County Board of Education's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

Report on Internal Control Over Compliance

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a State program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a State program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance with a type of compliance requirement of a State program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the Auditor's Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance and the State Single Audit Implementation Act. Accordingly, this report is not suitable for any other purpose.

Anderson Smith & Wike PLLC

December 17, 2025
West End, North Carolina

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
For the Fiscal Year Ended June 30, 2025

Section I - Summary of Auditors' Results

Financial Statements

Type of auditors' report issued:	*Unmodified*
Internal control over financial reporting:	
• Material weakness(es) identified?	*No*
• Significant deficiency(ies) identified that are not considered to be material weaknesses	*None Identified for Reporting*
Noncompliance material to financial statements noted	*No*

Federal Awards

Internal control over major federal programs:	
• Material weakness(es) identified?	*No*
• Significant deficiency(ies) identified that are not considered to be material weaknesses	*None Identified for Reporting*
Type of auditors' report issued on compliance for major federal programs	*Unmodified*
Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)?	*No*

Identification of major federal programs:

AL Numbers	Names of Federal Program or Cluster
	Child Nutrition Cluster:
10.553	School Breakfast Program
10.555	National School Lunch Program
10.555	National School Lunch Program (Commodities)
10.555	After School Snack Program
10.559	Summer Food Service Program for Children
84.425	COVID-19 – Education Stabilization Fund

Dollar threshold used to distinguish between Type A and Type B Programs	*$ 881,000*
Auditee qualified as low-risk auditee?	*Yes*

UNION COUNTY BOARD OF EDUCATION
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
For the Fiscal Year Ended June 30, 2025

Section I - Summary of Auditors' Results (Continued)

State Awards

Internal control over major State programs:

• Material weakness(es) identified?	*No*
• Significant deficiency(ies) identified that are not considered to be material weaknesses	*None Identified for Reporting*
Type of auditors' report issued on compliance for major State programs	*Unmodified*
Any audit findings disclosed that are required to be reported in accordance with the State Single Audit Implementation Act	*No*

Identification of major State programs:

Program Name
State Public School Fund
State Capital Infrastructure Funds - K-12 Facilities Grant
School Technology Fund

Dollar threshold used to distinguish between Major State Programs	*$ 500,000*
Auditee qualified as low-risk auditee?	*Yes*

Section II - Financial Statement Findings

No findings were noted that are required to be reported under *Government Auditing Standards*.

Section III - Federal Award Findings and Questioned Costs

No findings and questioned costs related to the audit of federal awards aggregating $25,000 or more were noted.

Section IV - State Award Findings and Questioned Costs

No findings and questioned costs related to the audit of State awards aggregating $25,000 or more were noted.

Finding: 24-01
Status: Corrected.

Grantor/Pass-through Grantor/Program Title	Federal AL Number	State/ Pass-through Grantor's Number	Expenditures
Federal Grants:			
U.S. Department of Agriculture			
Passed-through the N.C. Department of Agriculture:			
Child Nutrition Cluster:			
Noncash Assistance (Commodities):			
National School Lunch Program	10.555	PRC 035	$ 1,232,161
Cash Assistance:			
School Breakfast Program	10.553	PRC 035	2,549,285
National School Lunch Program	10.555	PRC 035	8,814,989
After School Snack Program	10.555	PRC 035	59,107
Child Nutrition Discretionary Funds	10.579	PRC 053	61,649
Summer Food Service Program for Children	10.559	PRC 035	97,648
Fresh Fruit and Vegetable Grant	10.582	PRC 035	49,871
Cash Assistance Subtotal			11,632,549
Total Child Nutrition Cluster			12,864,710
Local Food for Schools Cooperative Agreement Program	10.185		14,571
Total U.S. Department of Agriculture			12,879,281
U.S. Department of the Treasury			
Passed-through the N.C. Department of Public Instruction:			
COVID-19 - Coronavirus State and Local Fiscal Recovery Funds			
Smart Bus Safety Pilot	21.027	PRC 140	113,266
U.S. Department of Education			
Office of Elementary and Secondary Education			
Direct Programs:			
Teacher Incentive Fund	84.374A		82,690
LEGEND: Learner Engagement and			
Interventions Driving Student Success	84.184G		61,570
Total U.S. Department of Education Direct Programs			144,260
Passed-through the N.C. Department of Public Instruction:			
Title I, Grants to Local Educational Agencies	84.010	PRC 050	5,220,924
Student Support and Academic Enrichment	84.424	PRC 108	315,743
Supporting Effective Instruction	84.367	PRC 103	1,204,468
Language Acquisition Grant	84.365	PRC 104	282,407
Language Acquisition Grant - Significant Increase	84.365	PRC 111	41,482
Education for Homeless Children and Youth	84.196	PRC 026	56,408

Grantor/Pass-through Grantor/Program Title	Federal AL Number	State/ Pass-through Grantor's Number	Expenditures
COVID-19 - Education Stabilization Fund:			
ARP:			
COVID-19 - ESSER III - K-12 Emergency Relief Fund	84.425D	PRC 181	340,437
COVID-19 - ESSER III - Summer Career Accel. Programs	84.425U	PRC 188	144,131
COVID-19 - ESSER III - National Board for Professional Teaching Standards (NBPTS) Certification Fee Reimbursement	84.425U	PRC 198	32,300
Total COVID-19 - Education Stabilization Fund	84.425		516,868
Special Education Cluster:			
Grants to States - IDEA, part B (611)	84.027	PRC 060	7,382,866
Special Needs Targeted Assistance	84.027	PRC 118	66,766
Risk Pool	84.027	PRC 114	111,917
Preschool Grants - IDEA, Part B (619)	84.173	PRC 049	112,011
Preschool Targeted Assistance	84.173	PRC 119	10,101
Total Special Education Cluster			7,683,661
Career and Technical Education - Basic Grants to States			
Program Development	84.048	PRC 017	441,140
Total U.S. Department of Education			15,907,361
U.S. Department of Defense			
Direct Program:			
ROTC	12.000		464,008
Total Federal Assistance			**29,363,916**
State Grants:			
N.C. Department of Public Instruction			
Cash Assistance:			
State Public School Fund		Various	277,462,105
Career and Technical			
State Months of Employment		PRC 013	14,747,499
Program Support Funds		PRC 014	984,567
Driver Training		PRC 012	961,765
School Technology Fund		PRC 015	1,115,592
Cash assistance subtotal			295,271,528
Non-Cash Assistance:			
State Buses Appropriation		PRC 120	1,398,358
Total N.C. Department of Public Instruction			296,669,886

Grantor/Pass-through Grantor/Program Title	Federal AL Number	State/ Pass-through Grantor's Number	Expenditures
N.C. Office of State Budget and Management			
School Capital Infrastructure Facilities Grant		PRC 440	1,800,000
N.C. Department of Agriculture			
State Reduced Breakfast Program			6,147
State Reduced Lunch Program			27,095
Total N.C. Department of Agriculture			33,242
N.C. Department of Health and Human Services			
Division of Child Development:			
Smart Start		PRC 403	185,500
Total State Assistance			**298,688,628**
Total Federal and State Assistance			**$ 328,052,544**

Notes to the Schedule of Expenditures of Federal and State Awards:

Note 1. Basis of Presentation

The accompanying schedule of expenditures of federal and State awards (SEFSA) includes the federal and State grant activity of Union County Board of Education under the programs of the federal government and the State of North Carolina for the year ended June 30, 2025. The information in this SEFSA is presented in accordance with the requirements of Title 2 US Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and the State Single Audit Implementation Act. Because the Schedule presents only a selected portion of the operations of Union County Board of Education, it is not intended to and does not present the financial position, changes in net assets or cash flows of Union County Schools.

Note 2. Summary of Significant Accounting Policies

Expenditures reported in the SEFSA are reported on the modified accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

Union County Bouard of Education has elected not to use the 10-percent de minimis indirect cost rate as allowed under the Uniform Guidance.

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

File #: 26-272 **Agenda Date:** 5/18/2026

TITLE:

Communications Monthly Report - April 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

April 2026





Top Projects

1 Remembering Commissioner Gary Sides

When Commissioner Gary Sides resigned before unfortunately passing away, Public Communications coordinated numerous projects including press releases, website updates, social media posts, memorials for the Board of Commissioners meeting, and more. Input from the Clerk to the Board, County Attorney and County Manager's Office helped shape the communications and ensure they were timely, respectful and accurate.





2 Engage Union County Relaunch

Union County Public Communications has worked to relaunch a website intended to serve as the County's official online engagement platform. This new platform consists of projects across various County departments, giving community members and residents an easy way to provide input on projects, policies and priorities. This communications campaign included social posts, website graphics and a news story.

3 Stage 1 Water Conservation

Due to worsening drought conditions across the southeastern United States, Union County implemented Stage 1 of its Water Shortage Response Plan on Tuesday, April 21. Communications included a press release, an email blast to customers, social media, and website updates.



163 Projects Completed

27 Departments Supported

Website

Top Search Terms

1. Passport
2. Jobs
3. Burn Ban
4. Landfill
5. Employment

Top Webpages

1. GIS & Mapping
2. Taxes & Property
3. Cane Creek Park

Website Visits

unioncountync.gov

393,597

3.8% vs. previous month

Sprout Automated Webchat

Let's Chat

719 Total Engagements

Social Media

46,420 Total Followers

Top Posts



Facebook

6.3% Engagement Rate
43,136 Reach



LinkedIn

12.7% Engagement Rate
1,344 Impressions



Instagram

2.6% Engagement Rate
2,127 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

95 Received ▶ **84** Completed

Media Interactions

11

Creative Highlights



Union Conserves Info Cards



Economic Development Website Banners



Solid Waste Site Signage

Video Engagement



YouTube

Making a Difference: Our Community Easter Basket

140 Views

.5 Hours Watch Time

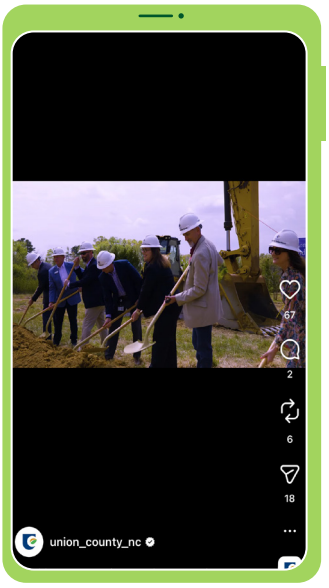


Facebook

Food Innovation Center Groundbreaking

5,900 Views

11,630 Impressions



Instagram

Food Innovation Center Groundbreaking

2,503 Views

1,768 Average Reach

Union County, NC

Staff Report

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

File #: 26-290 **Agenda Date:** 5/18/2026

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 April 2026 is summarized in the attached table.

Twelve Mile Creek

- Percent of Actual Flows = 69.5%
- Percent of Actual + Permitted Flows = 88.2%
- Actual Flows (MGD) = 5.212
- Actual + Permitted Obligated Flows (MGD) = 6.612

Crooked Creek

- Percent of Actual Flows = 63.8%
- Percent of Actual + Permitted Flows = 91.4%
- Actual Flows (MGD) = 1.212
- Actual + Permitted Obligated Flows (MGD) = 1.736

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 = 38.0%

- Percent of Actual + Permitted Flows = 38.0%
- Actual Flows (MGD) = 0.019
- Actual + Permitted Obligated Flows (MGD) = 0.019

Grassy Branch

- Percent of Actual Flows = 76.0%
- Percent of Actual + Permitted Flows = 78.0%
- Actual Flows (MGD) = 0.038
- Actual + Permitted Obligated Flows (MGD) = 0.039

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 April 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	5.212	69.5%	6.612	88.2%	1.3
Crooked Creek	1.9	1.212	63.8%	1.736	91.4%	0.6
Olde Sycamore	0.15	0.039	26.0%	0.039	26.0%	06
Tallwood	0.05	0.019	38.0%	0.019	38.0%	1.1
Grassy Branch	0.05	0.038	76.0%	0.039	78.0%	0.6

[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	4	0.275
Engineering Plan Review	14	0.372
Sketch Plan Review	11	0.363
Totals	**29**	**1.010**

Crooked Creek WRF		
Backlog Type	**Number of Projects**	**Requested Flow (MGD)**
Approved – Permit Submittal Pending	4	0.077
Engineering Plan Review	5	0.173
Sketch Plan Review	8	0.152
Totals	**17**	**0.402**

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

File #: 26-268 **Agenda Date:** 5/18/2026

TITLE:

America 250 Update

INFORMATION CONTACT:

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

ACTION REQUESTED:

Receive information on America 250 related events and programs in Union County.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County is proud to celebrate the 250th anniversary of the signing of the Declaration of Independence on July 4, 2026, a defining moment in our nation's history. This upcoming milestone provides an opportunity to reflect on our country's founding principles and honor the progress and resilience of our community. This presentation includes an overview of various events, programs, and special projects related to America 250. Information continues to be shared across various platforms, with our website being our central location for sharing America 250 information: http://unioncountync.gov/america250

FINANCIAL IMPACT:

None.

Union County, NC

Staff Report

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

File #: 26-284 **Agenda Date:** 5/18/2026

TITLE:

Drought Update - Stage 2

INFORMATION CONTACT:

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

ACTION REQUESTED:

None.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Union County Water is moving to Stage 2 Drought Restrictions on May 15. Staff will update the Board about the latest drought conditions, what customers can expect with the new restrictions, as well as resources to get additional information.

FINANCIAL IMPACT:

None.

File #: 26-188 **Agenda Date:** 5/18/2026

TITLE:

Marshville Bypass Tolling Proposal

INFORMATION CONTACT:

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

ACTION REQUESTED:

None - Information Only.

PRIOR BOARD ACTIONS:

1) January 19, 2021, Regular Meeting, Agenda Item # 21 - Requesting tolling study and submittal for evaluation in 2050 Metropolitan Transportation Plan
2) February 3, 2025, Regular Meeting, Agenda Item # 25-044 - Submittal for evaluation in 2055 Metropolitan Transportation Plan

BACKGROUND:

The Marshville Bypass is a proposed four-lane median divided highway that would effectively extend the Monroe Expressway System by 5.1 miles from the current eastern terminus of the Monroe Expressway with a new location bypass south of Marshville, although the specific route would be determined through a full design process once funded. The project would have one intermediate interchange with Landsford Road south of Hasty Road and re-connect with U.S. 74 between Stegall Road and Gaddy Road.

The bypass has been submitted for funding through the two most recent Charlotte Regional Transportation Planning Organization (CRTPO) Metropolitan Transportation Plans (MTP), with it not scoring high enough for inclusion. In 2021 Union County and Marshville passed resolutions asking it to be studied as a possible tolled project. The NCDOT and NC Turnpike completed its work in January 2026, with the conclusion that by considering the bypass a part of the Monroe Expressway and extending the tolling on the bypass and Expressway for approximately 16 years, approximately ¾ of the estimated $287 million cost could be paid for by tolls. The remaining cost would need to be funded through the traditional Statewide Transportation Improvement Program (STIP) process. The Town of Marshville evaluated this proposal at its May 4 meeting.

FINANCIAL IMPACT:

None.

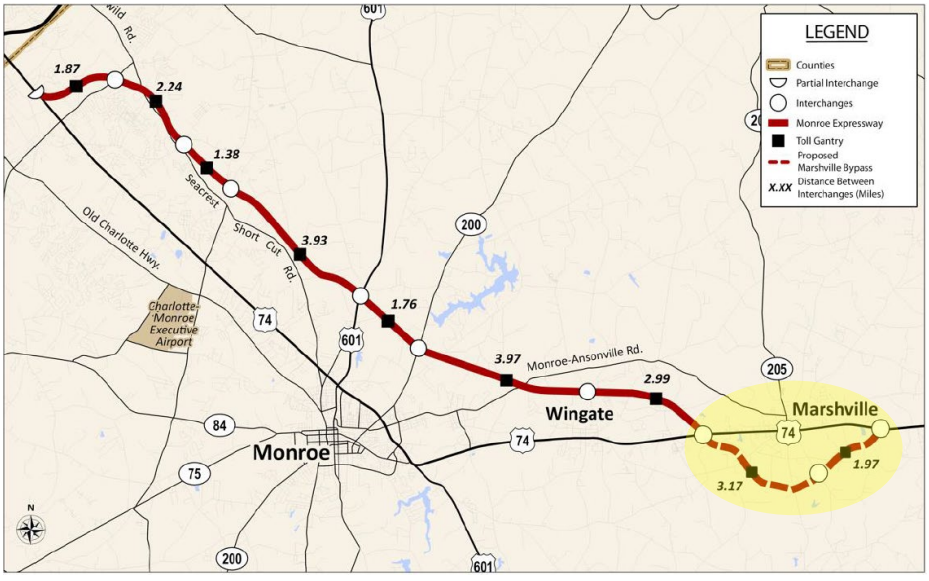
Marshville Bypass Tolling Analysis

Background

The Charlotte Regional Transportation Planning Organization (CRTPO) passed a series of resolutions requesting the North Carolina Department of Transportation (NCDOT) and North Carolina Turnpike Authority (NCTA) analyze the Marshville Bypass as a toll facility under the Tolling Pre-Submittal Assessment process. CRTPO passed the resolution to study the Marshville Bypass as a potential tolled project following requests from the Town of Marshville and Union County. The Marshville Bypass is a proposed four-lane median divided highway that would effectively extend the Monroe Expressway System by 5.1 miles from the current eastern terminus of the Monroe Expressway with a new location bypass south of Marshville. The project would have one intermediate interchange with Landsford Road south of Hasty Road and re-connect with U.S. 74 between Stegall Road and Gaddy Road. Acting as an extension of the Monroe Expressway System, it is anticipated the Marshville Bypass would be a tolled, limited access facility with posted speeds of 65 miles per hour. Exhibit 1 depicts the proposed project.

After an initial evaluation was completed using the Tolling Pre-Submittal Assessment process, looking at the proposed Marshville Bypass project as a stand-alone facility, it was determined that a sketch level traffic and revenue study should be prepared to consider the Marshville Bypass as an extension of the existing Monroe Expressway System for financing purposes. CDM Smith, a traffic and revenue consultant for NCTA, was contracted to provide a sketch level (level one) traffic and revenue study for the proposed project. This traffic and revenue study served as the basis for analysis by NCTA and its municipal Advisor, PFM, LLC. NCTA used the traffic and revenue study to develop a preliminary long-term financial plan for the project to assess the viability of tolling on the corridor. For baseline reference, the Marshville Bypass was also analyzed as a stand-alone facility, separate from the Monroe Expressway System. The main difference between these scenarios is the ability to use Monroe Expressway System revenue to support operations of the Marshville Bypass and vice versa. This synopsis outlines the analysis completed by NCTA and details the findings.

Exhibit 1: Marshville Bypass Vicinity Map



Traffic and Revenue Study

The traffic and revenue study produced by CDM Smith used the travel demand model roadway network coding to model Marshville Bypass and the interchange associated with the project. Additional model refinements are described in the report, attached as ***Appendix A***. The project is assumed to have two mainline toll zones separated at the Landsford Road / U.S. 74 exit.

As mentioned above, the project was modeled both as an extension to the Monroe Expressway System and as a stand-alone project. In addition, the area was analyzed with a build and no build scenario to model traffic diversion and usage. Both scenarios were modeled by CDM Smith with the same socioeconomic projections.

General assumptions for the project include an opening year of FY 2035 with a toll collection structure similar to existing NCTA operational facilities. This structure includes toll collection for Electronic Toll Collection (ETC) and Bill By Mail (BBM) with a 50% discount for transponder users using ETC. ETC customers are required to maintain a prepaid balance for the discount, whereas BBM users are postpaid. The toll schedule for the project incorporates annual incremental toll rate increases of approximately 2% mirroring the current Monroe Expressway System schedule. The toll rates are set to align with the Monroe Expressway System on a per-mile basis.

Overall, the study shows moderate traffic diversion from existing U.S. 74 as a result of Marshville Bypass opening. Projections indicate the project would divert approximately 33-36% of weekday traffic from U.S. 74. The project is estimated to increase Monroe Expressway System transactions by roughly 13%, correlating to an increase in system-wide revenue of approximately 14%, when comparing the forecasted revenue of the Monroe Expressway System without the Marshville Bypass. The bypass is also projected to divert a higher percentage of commercial vehicles off of U.S. 74 than personal cars. The estimated impact for commercial vehicles diverting is approximately 43-47%. The full report attached as ***Appendix A*** further details the report and its findings.

Financial Analysis Overview

Following the traffic and revenue study, NCTA along with its financial advisor, developed a financial model to assess the financial feasibility of the project. The model uses the anticipated construction costs, modeled operational costs, current market conditions, and projected traffic and revenue streams from the Traffic and Revenue Study. Anticipated construction costs were provided by NCDOT based on conceptual designs and used to develop annual construction cashflow requirements. Monroe Expressway operational costs were used as a proxy for the project's operational costs. Monroe Expressway costs were scaled to match the length of the project. This approach is consistent with the process used to assess toll viability on potential projects through the Tolling Pre-Submittal Assessment process.

The analysis of the Marshville Bypass delivered as an extension of the Monroe Expressway System indicates that the project would likely generate enough toll revenue to fully support operational costs of the road. This includes invoice processing, routine maintenance and major maintenance and repair activities. The project would also likely be able to support some level of toll-related debt capacity for construction financing. The project funding gap is currently approximated at $0 – $100M. This range is representative of the multitude of variables affecting financing, including but not limited to a changing interest rate environment and refinancing/leveraging opportunities on the existing Monroe Expressway System.

Adding the Marshville Bypass as an extension to the Monroe Expressway would allow the benefits of a single lien allowing revenues to be used in combination to finance, operate and maintain the system. Financing the project in this manner would allow the project to raise significantly more capital to fund the construction. It is important to note that the addition of the Marshville Bypass would extend the existing debt on the Monroe Expressway from 2054 to 2070.

The project was also analyzed as a stand-alone project, not relying as an extension to the Monroe Expressway System. The analysis indicates that the project delivered in this manner would likely not generate sufficient revenues to support construction but would be able to cover most if not all the roads operational costs.

In summary, the analysis shows that if the project were delivered as a stand-alone project, tolling would likely support some limited operations, it would likely not generate sufficient revenue to contribute to construction nor help reduce the STIP contribution. The analysis also indicates that if delivered as an extension to the existing Monroe Expressway System, the project would likely be able to support full operations and reduce the needed NCDOT funding to less than $100m. For the full financial analysis please see ***Appendix B***.

System Scenario (Monroe Expressway with Marshville Bypass Extension):

Revenue	Project Total (2035-2070)	Costs	Project Total (2035-2070)
Toll Revenue via Electronic Toll Collection	~$2160M	Operations	~$810M
Toll Revenue via Bill By Mail	~$1170M	Maintenance	~$315M
Uncollectable Toll Revenue	~($155M)	Roadway Major Maintenance	~$245M
Revenue from Fees	~$115M	Toll Major Maintenance	~$140M
Net Revenue	**~$3290M**	**Total Costs**	**~$1510M**

*Revenues and costs are presented in year of expenditure with an assumed annual inflation of 2.5% for costs. Totals may not add due to rounding.

Stand-alone Scenario (Marshville Bypass not part of Monroe Expressway System):

Revenue	Project Total (2035-2070)	Costs	Project Total (2035-2070)
Toll Revenue via Electronic Toll Collection	~$275M	Operations	~$160M
Toll Revenue via Bill By Mail	~$140M	Maintenance	~$65M
Uncollectable Toll Revenue	~($20M)	Roadway Major Maintenance	~$40M
Revenue from Fees	~$5M	Toll Major Maintenance	~$30M
Net Revenue	**~$400M**	**Total Costs**	**~$295M**

*Revenues and costs are presented in year of expenditure with an assumed annual inflation of 2.5% for costs. Totals may not add due to rounding.

Memorandum

To: *David Roy, NCTA*

From: *Adam Aceto*

Date: *November 11, 2025*

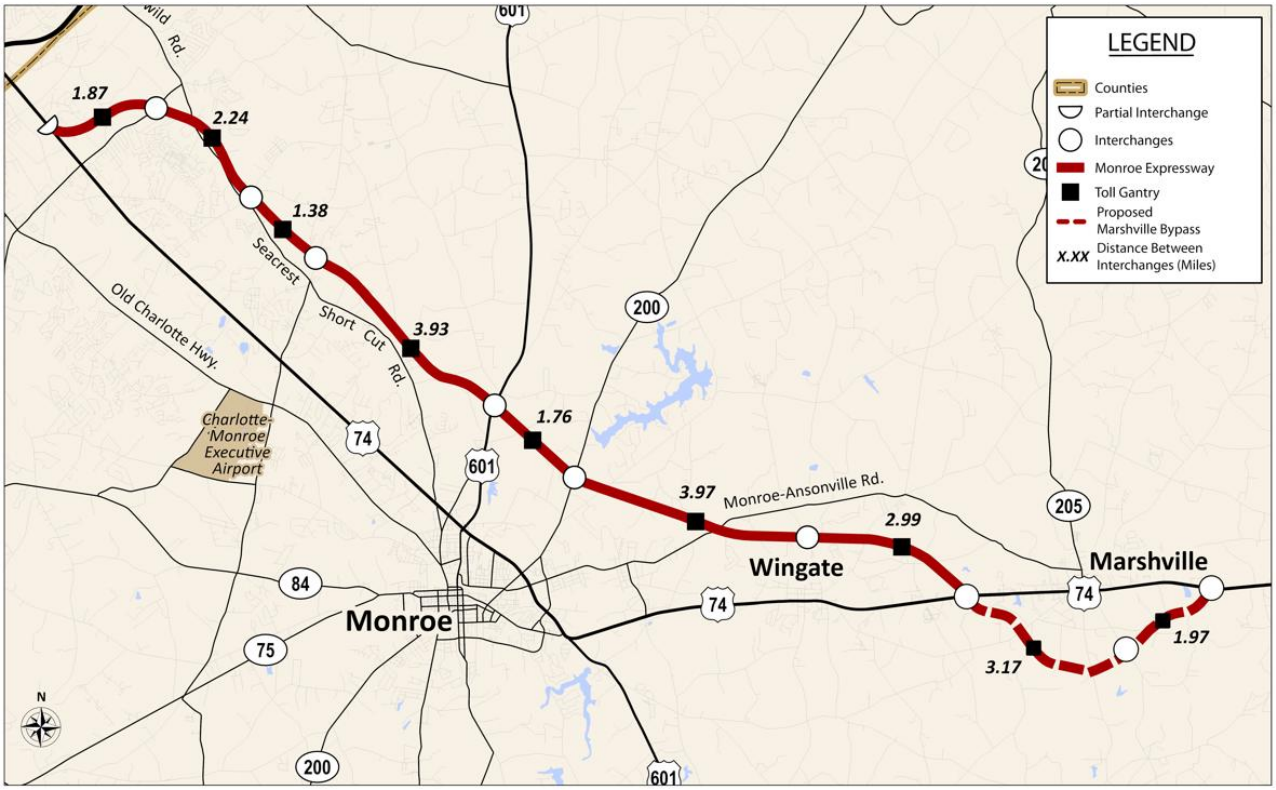
Subject: *Marshville Bypass Sketch-Level Traffic and Revenue Forecast Study*

This memo summarizes the sketch-level analysis and forecast for traffic and revenue impacts for the proposed Marshville Bypass, an extension of the Monroe Expressway which would bypass US 74 around the town of Marshville, NC.

Project Description

For the purposes of this study, the proposed Marshville Bypass was assumed to extend 5.1 miles from the current eastern terminus of the Monroe Expressway to the south of Marshville, have one intermediate interchange with Landsford Road south of Hasty Road, and re-connect with US 74 between Stegall Road and Gaddy Road. As an extension to Monroe Expressway, the Marshville Bypass would be two lanes per direction, limited access, and be posted at 65mph. The location of the Monroe Expressway and proposed Marshville Bypass are shown in **Figure 1**.

Figure 1 – Project Location



Model Refinements

All modeling, analysis, per-mile toll rates, and T&R forecasting tools for this study were based on the most recent available T&R studies for Monroe Expressway, including the 2024 ***Monroe Expressway Traffic and Revenue Forecast Update (2024 T&R Update)*** which estimated the impacts of a revised electronic toll collection (ETC) toll rate discount to be implemented on January 1, 2025, and the subsequent 2025 ***Draft Monroe Expressway Planning Level Traffic and Revenue Forecast Update (2025 T&R Update)*** that refined the 2024 T&R Update forecast to account for Monroe Expressway T&R performance through June 2025.

Model refinements performed in this study for the evaluation of the traffic and revenue impacts of the Marshville Bypass were limited to:

1. Travel demand model roadway network coding to include the proposed Marshville Bypass and associated interchanges
2. Toll schedule expansion to accommodate the two mainline toll zones on the Marshville Bypass (see **Table 1**)
3. Revision of toll assignment scripts to accommodate additional toll zones
4. Minor revisions to travel demand model calibration to observed traffic counts and travel speeds on US 74 in Marshville and Old Highway 74 in Marshville and Wingate

Toll rates for the two mainline toll locations on the Marshville Bypass are set to match the adopted toll rate schedule for the Monroe Expressway on a per-mile basis. Class 1 ETC transactions for the two mainline toll locations are $0.63 and $0.39 in 2035, escalating at 2.0 percent per year thereafter. For a complete trip along the entire 23-mile corridor on the Monroe Expressway and Marshville Bypass, Class 1 ETC customers would pay $4.61 in 2035.

Traffic and Revenue Analysis

Subsequent to the aforementioned model refinements, tolled traffic assignments were conducted for a build condition and a no-build condition, reflecting scenarios with and without the Marshville Bypass. The resulting impacts of the Marshville Bypass to Monroe Expressway system traffic and revenue were then applied to the 2025 T&R Update forecast. The resulting traffic and revenue forecast, as well as a comparison of systemwide collected revenue to the 2025 T&R Update, are presented in **Table 2 through Table 5**. The opening date of the Marshville Bypass was assumed to be January 1, 2035. The horizon model year for this forecast was 2040. Traffic and revenue estimates beyond 2040 are based on 1.1 percent annual transaction growth from 2040 to 2045, 0.8 percent annual transaction growth from 2045 to 2068, and 2.0 percent annual toll rate escalation.

Table 1
Recommended Monroe Expressway Class 1 Toll Rates by Tolling Zone

	Existing Monroe Expressway														Marshville Bypass					
	Zone 01/02 (1.87 mi.)		**Zone 03/04** (2.24 mi.)		**Zone 05/06** (1.38 mi.)		**Zone 07/08** (3.93 mi.)		**Zone 09/10** (1.76 mi.)		**Zone 11/12** (3.97 mi.)		**Zone 13/14** (2.99 mi.)		**Zone 15/16** (3.17 mi.)		**Zone 17/18** (1.97 mi.)		
Calendar Year (1)	Indian Trail Fairview Rd. - US 74		Unionville Indian Trail Rd. - Indian Trail Fairview Rd.		N. Rocky River Rd. - Unionville Indian Trail Rd.		US 601 - N. Rocky River Rd.		NC 200 - US 601		Austin Chaney Rd. - NC 200		US 74 - Austin Chaney Rd		Landsford Rd. - US 74		US 74 - Landsford Rd.		**Through Trip Toll (Passes through All Zones)**	
	ETC	BBM	ETC	BBM	ETC	BBM	ETC	BBM	ETC	BBM	ETC	BBM	ETC	BBM	ETC	BBM	ETC	BBM	ETC	BBM
2035	0.37	0.74	0.44	0.88	0.27	0.54	0.78	1.56	0.35	0.70	0.79	1.58	0.59	1.18	0.63	1.25	0.39	0.78	4.61	9.21
2036	0.37	0.74	0.45	0.90	0.27	0.54	0.79	1.58	0.36	0.72	0.81	1.62	0.60	1.20	0.64	1.28	0.40	0.79	4.68	9.37
2037	0.38	0.76	0.46	0.92	0.28	0.56	0.81	1.62	0.37	0.74	0.82	1.64	0.62	1.24	0.65	1.31	0.41	0.81	4.80	9.60
2038	0.39	0.78	0.47	0.94	0.29	0.58	0.83	1.66	0.38	0.76	0.84	1.68	0.63	1.26	0.67	1.34	0.42	0.83	4.92	9.83
2039	0.40	0.80	0.47	0.94	0.29	0.58	0.84	1.68	0.38	0.76	0.86	1.72	0.64	1.28	0.68	1.36	0.42	0.84	4.98	9.96
2040	0.41	0.82	0.49	0.98	0.30	0.60	0.86	1.72	0.39	0.78	0.88	1.76	0.66	1.32	0.70	1.39	0.43	0.87	5.12	10.24
2041	0.42	0.84	0.50	1.00	0.31	0.62	0.88	1.76	0.40	0.80	0.90	1.80	0.67	1.34	0.71	1.43	0.44	0.89	5.24	10.47
2042	0.43	0.86	0.51	1.02	0.31	0.62	0.89	1.78	0.41	0.82	0.92	1.84	0.69	1.38	0.73	1.45	0.45	0.90	5.34	10.68
2043	0.44	0.88	0.52	1.04	0.32	0.64	0.91	1.82	0.41	0.82	0.93	1.86	0.70	1.40	0.74	1.48	0.46	0.92	5.43	10.86
2044	0.44	0.88	0.53	1.06	0.32	0.64	0.93	1.86	0.42	0.84	0.95	1.90	0.71	1.42	0.75	1.50	0.47	0.93	5.52	11.04
2045	0.45	0.90	0.54	1.08	0.33	0.66	0.95	1.90	0.43	0.86	0.97	1.94	0.73	1.46	0.77	1.54	0.48	0.96	5.65	11.29
2046	0.46	0.92	0.55	1.10	0.34	0.68	0.97	1.94	0.44	0.88	0.99	1.98	0.74	1.48	0.78	1.57	0.49	0.98	5.76	11.52
2047	0.47	0.94	0.56	1.12	0.34	0.68	0.99	1.98	0.45	0.90	1.01	2.02	0.76	1.52	0.80	1.60	0.50	0.99	5.88	11.76
2048	0.48	0.96	0.57	1.14	0.35	0.70	1.01	2.02	0.46	0.92	1.03	2.06	0.77	1.54	0.82	1.63	0.51	1.01	5.99	11.99
2049	0.49	0.98	0.59	1.18	0.36	0.72	1.03	2.06	0.47	0.94	1.05	2.10	0.79	1.58	0.84	1.67	0.52	1.04	6.13	12.27
2050	0.50	1.00	0.60	1.20	0.37	0.74	1.05	2.10	0.48	0.96	1.07	2.14	0.80	1.60	0.85	1.70	0.53	1.06	6.25	12.50
2051	0.51	1.02	0.61	1.22	0.37	0.74	1.07	2.14	0.48	0.96	1.09	2.18	0.82	1.64	0.87	1.73	0.54	1.08	6.35	12.71
2052	0.52	1.04	0.62	1.24	0.38	0.76	1.09	2.18	0.49	0.98	1.12	2.24	0.84	1.68	0.88	1.77	0.55	1.10	6.49	12.99
2053	0.53	1.06	0.63	1.26	0.39	0.78	1.11	2.22	0.50	1.00	1.14	2.28	0.85	1.70	0.90	1.80	0.56	1.12	6.61	13.22
2054	0.54	1.08	0.65	1.30	0.40	0.80	1.13	2.26	0.51	1.02	1.16	2.32	0.87	1.74	0.92	1.84	0.57	1.14	6.75	13.50
2055	0.55	1.10	0.66	1.32	0.40	0.80	1.16	2.32	0.52	1.04	1.18	2.36	0.89	1.78	0.94	1.87	0.58	1.16	6.88	13.76
2056	0.56	1.12	0.67	1.34	0.41	0.82	1.18	2.36	0.54	1.08	1.21	2.42	0.91	1.82	0.96	1.92	0.60	1.19	7.03	14.07
2057	0.57	1.14	0.69	1.38	0.42	0.84	1.20	2.40	0.55	1.10	1.23	2.46	0.92	1.84	0.98	1.95	0.61	1.21	7.16	14.32
2058	0.59	1.18	0.70	1.40	0.43	0.86	1.23	2.46	0.56	1.12	1.26	2.52	0.94	1.88	1.00	2.00	0.62	1.24	7.33	14.66
2059	0.59	1.18	0.71	1.42	0.43	0.86	1.25	2.50	0.57	1.14	1.28	2.56	0.96	1.92	1.02	2.04	0.63	1.26	7.44	14.88
2060	0.60	1.20	0.72	1.44	0.44	0.88	1.28	2.56	0.58	1.16	1.30	2.60	0.98	1.96	1.04	2.08	0.64	1.28	7.58	15.16
2061	0.62	1.24	0.74	1.48	0.45	0.90	1.30	2.60	0.59	1.18	1.33	2.66	1.00	2.00	1.06	2.12	0.65	1.30	7.74	15.48
2062	0.63	1.26	0.75	1.50	0.46	0.92	1.33	2.66	0.61	1.22	1.36	2.72	1.02	2.04	1.08	2.16	0.66	1.32	7.90	15.80
2063	0.64	1.28	0.77	1.54	0.47	0.94	1.36	2.72	0.62	1.24	1.38	2.76	1.04	2.08	1.10	2.20	0.68	1.36	8.06	16.12
2064	0.65	1.30	0.78	1.56	0.48	0.96	1.38	2.76	0.63	1.26	1.41	2.82	1.06	2.12	1.13	2.26	0.69	1.38	8.21	16.42
2065	0.67	1.34	0.80	1.60	0.49	0.98	1.41	2.82	0.64	1.28	1.44	2.88	1.08	2.16	1.15	2.30	0.71	1.42	8.39	16.78
2066	0.68	1.36	0.81	1.62	0.50	1.00	1.44	2.88	0.65	1.30	1.47	2.94	1.10	2.20	1.17	2.34	0.72	1.44	8.54	17.08
2067	0.69	1.38	0.83	1.66	0.51	1.02	1.47	2.94	0.67	1.34	1.50	3.00	1.12	2.24	1.19	2.38	0.73	1.46	8.71	17.42
2068	0.71	1.42	0.84	1.68	0.52	1.04	1.50	3.00	0.68	1.36	1.53	3.06	1.14	2.28	1.22	2.44	0.75	1.50	8.89	17.78

1) Assumes toll rates will be increased annually on January 1.

Note: Class 2 tolls are two times the Class 1 tolls and Class 3 tolls are four times the Class 1 tolls.

Table 2 - Estimated Annual Transactions for Monroe Expressway System, Marshville Bypass Build Scenario (in thousands)

Fiscal	Class 1				Classes 2 and 3				All Vehicles			
Year	BBM	ETC	Total	% ETC	BBM	ETC	Total	% ETC	BBM	ETC	Total	% ETC
2035	18,080	38,443	56,523	68.0	1,129	6,265	7,393	84.7	19,209	44,707	63,916	69.9
2036	19,097	41,583	60,680	68.5	1,216	6,816	8,032	84.9	20,313	48,399	68,712	70.4
2037	19,039	42,369	61,408	69.0	1,225	6,930	8,155	85.0	20,264	49,299	69,563	70.9
2038	18,981	43,169	62,150	69.5	1,234	7,046	8,280	85.1	20,215	50,215	70,430	71.3
2039	18,924	43,984	62,908	69.9	1,243	7,164	8,407	85.2	20,167	51,148	71,315	71.7
2040	18,866	44,814	63,681	70.4	1,253	7,284	8,537	85.3	20,119	52,098	72,217	72.1
2041	18,853	45,581	64,434	70.7	1,258	7,391	8,650	85.5	20,111	52,972	73,083	72.5
2042	18,883	46,282	65,165	71.0	1,260	7,485	8,746	85.6	20,143	53,767	73,910	72.7
2043	18,913	46,993	65,906	71.3	1,262	7,580	8,843	85.7	20,176	54,573	74,749	73.0
2044	18,943	47,715	66,658	71.6	1,265	7,677	8,941	85.9	20,208	55,391	75,599	73.3
2045	18,974	48,447	67,421	71.9	1,267	7,774	9,041	86.0	20,240	56,221	76,462	73.5
2046	18,971	49,112	68,083	72.1	1,266	7,862	9,128	86.1	20,236	56,974	77,211	73.8
2047	18,935	49,708	68,643	72.4	1,261	7,940	9,201	86.3	20,196	57,648	77,844	74.1
2048	18,898	50,311	69,209	72.7	1,257	8,018	9,275	86.4	20,156	58,329	78,484	74.3
2049	18,862	50,920	69,783	73.0	1,253	8,097	9,350	86.6	20,116	59,018	79,133	74.6
2050	18,827	51,537	70,364	73.2	1,249	8,177	9,426	86.7	20,076	59,714	79,790	74.8
2051	18,783	52,160	70,943	73.5	1,244	8,258	9,502	86.9	20,027	60,418	80,445	75.1
2052	18,732	52,788	71,521	73.8	1,237	8,341	9,578	87.1	19,969	61,129	81,099	75.4
2053	18,682	53,424	72,106	74.1	1,230	8,425	9,655	87.3	19,912	61,849	81,761	75.6
2054	18,631	54,067	72,699	74.4	1,224	8,509	9,733	87.4	19,855	62,576	82,431	75.9
2055	18,581	54,718	73,299	74.7	1,217	8,594	9,811	87.6	19,798	63,312	83,110	76.2
2056	18,531	55,376	73,907	74.9	1,210	8,680	9,891	87.8	19,741	64,057	83,798	76.4
2057	18,481	56,042	74,523	75.2	1,204	8,768	9,971	87.9	19,685	64,810	84,494	76.7
2058	18,431	56,716	75,147	75.5	1,197	8,856	10,053	88.1	19,628	65,571	85,200	77.0
2059	18,375	57,366	75,741	75.7	1,193	8,945	10,138	88.2	19,568	66,311	85,879	77.2
2060	18,314	58,016	76,331	76.0	1,192	9,029	10,221	88.3	19,506	67,046	86,552	77.5
2061	18,254	58,674	76,928	76.3	1,191	9,115	10,306	88.4	19,445	67,789	87,234	77.7
2062	18,193	59,339	77,532	76.5	1,190	9,201	10,391	88.5	19,383	68,540	87,923	78.0
2063	18,133	60,011	78,144	76.8	1,189	9,288	10,477	88.7	19,322	69,300	88,622	78.2
2064	18,073	60,692	78,765	77.1	1,188	9,376	10,564	88.8	19,261	70,068	89,329	78.4
2065	18,013	61,379	79,393	77.3	1,187	9,465	10,652	88.9	19,200	70,844	90,045	78.7
2066	17,954	62,075	80,029	77.6	1,186	9,555	10,741	89.0	19,140	71,630	90,769	78.9
2067	17,894	62,778	80,673	77.8	1,185	9,645	10,830	89.1	19,079	72,424	91,503	79.1
2068	17,835	63,490	81,325	78.1	1,184	9,737	10,920	89.2	19,019	73,227	92,245	79.4
Average Annual Percent Change												
2035-45	0.5%	2.3%	1.8%		1.2%	2.2%	2.0%		0.5%	2.3%	1.8%	
2045-68	-0.3%	1.2%	0.8%		-0.3%	1.0%	0.8%		-0.3%	1.2%	0.8%	
2035-68	0.0%	1.5%	1.1%		0.1%	1.3%	1.2%		0.0%	1.5%	1.1%	

Table 3 - Estimated Annual Gross Toll Revenue for Monroe Expressway System, Marshville Bypass Build Scenario (in thousands $)

Fiscal	Class 1				Classes 2 and 3				All Vehicles			
Year	BBM	ETC	Total	% ETC	BBM	ETC	Total	% ETC	BBM	ETC	Total	% ETC
2035	$17,701	$18,017	$35,718	50.4	$4,312	$12,484	$16,796	74.3	$22,014	$30,501	$52,514	58.1
2036	19,176	19,948	39,124	51.0	4,435	12,945	17,380	74.5	23,611	32,892	56,504	58.2
2037	19,545	20,733	40,278	51.5	4,556	13,424	17,980	74.7	24,101	34,157	58,258	58.6
2038	19,825	21,557	41,382	52.1	4,680	13,922	18,602	74.8	24,505	35,479	59,983	59.1
2039	20,110	22,412	42,523	52.7	4,811	14,438	19,250	75.0	24,922	36,850	61,772	59.7
2040	20,554	23,290	43,845	53.1	4,949	14,982	19,931	75.2	25,503	38,272	63,776	60.0
2041	20,961	24,169	45,131	53.6	5,071	15,517	20,588	75.4	26,033	39,686	65,719	60.4
2042	21,326	25,047	46,373	54.0	5,180	16,031	21,211	75.6	26,506	41,078	67,584	60.8
2043	21,808	25,945	47,753	54.3	5,289	16,559	21,848	75.8	27,098	42,503	69,601	61.1
2044	22,316	26,871	49,186	54.6	5,403	17,102	22,506	76.0	27,719	43,973	71,692	61.3
2045	22,817	27,811	50,628	54.9	5,523	17,665	23,188	76.2	28,340	45,477	73,817	61.6
2046	23,261	28,743	52,004	55.3	5,632	18,222	23,854	76.4	28,893	46,965	75,857	61.9
2047	23,689	29,672	53,361	55.6	5,727	18,770	24,497	76.6	29,416	48,442	77,858	62.2
2048	24,131	30,627	54,758	55.9	5,820	19,335	25,155	76.9	29,951	49,962	79,913	62.5
2049	24,582	31,627	56,209	56.3	5,918	19,918	25,836	77.1	30,500	51,546	82,046	62.8
2050	25,009	32,650	57,659	56.6	6,019	20,518	26,537	77.3	31,028	53,167	84,196	63.1
2051	25,417	33,704	59,121	57.0	6,112	21,136	27,248	77.6	31,529	54,840	86,369	63.5
2052	25,914	34,810	60,723	57.3	6,200	21,776	27,976	77.8	32,114	56,585	88,699	63.8
2053	26,357	35,956	62,313	57.7	6,290	22,434	28,724	78.1	32,647	58,390	91,037	64.1
2054	26,794	37,105	63,899	58.1	6,379	23,112	29,491	78.4	33,173	60,217	93,390	64.5
2055	27,235	38,288	65,522	58.4	6,468	23,813	30,280	78.6	33,702	62,101	95,803	64.8
2056	27,665	39,526	67,191	58.8	6,562	24,531	31,093	78.9	34,227	64,057	98,284	65.2
2057	28,182	40,793	68,975	59.1	6,659	25,270	31,929	79.1	34,841	66,064	100,904	65.5
2058	28,619	42,115	70,734	59.5	6,754	26,036	32,790	79.4	35,373	68,151	103,524	65.8
2059	29,026	43,396	72,422	59.9	6,858	26,820	33,679	79.6	35,884	70,216	106,100	66.2
2060	29,469	44,772	74,240	60.3	6,983	27,612	34,594	79.8	36,451	72,383	108,835	66.5
2061	29,936	46,214	76,150	60.7	7,112	28,435	35,547	80.0	37,048	74,649	111,697	66.8
2062	30,432	47,738	78,170	61.1	7,243	29,278	36,521	80.2	37,675	77,016	114,690	67.2
2063	30,900	49,261	80,161	61.5	7,377	30,152	37,529	80.3	38,277	79,413	117,690	67.5
2064	31,332	50,762	82,094	61.8	7,514	31,053	38,567	80.5	38,847	81,815	120,661	67.8
2065	31,815	52,376	84,191	62.2	7,649	31,958	39,607	80.7	39,463	84,335	123,798	68.1
2066	32,304	54,039	86,343	62.6	7,790	32,910	40,700	80.9	40,094	86,950	127,043	68.4
2067	32,755	55,689	88,445	63.0	7,934	33,889	41,823	81.0	40,689	89,579	130,268	68.8
2068	33,261	57,465	90,726	63.3	8,077	34,882	42,959	81.2	41,338	92,347	133,685	69.1
Average Annual Percent Change												
2035-45	2.6%	4.4%	3.6%		2.5%	3.5%	3.3%		2.6%	4.1%	3.5%	
2045-68	1.7%	3.2%	2.6%		1.7%	3.0%	2.7%		1.7%	3.1%	2.6%	
2035-68	1.9%	3.6%	2.9%		1.9%	3.2%	2.9%		1.9%	3.4%	2.9%	

Table 4 - Estimated Annual Collected Revenue for Monroe Expressway System, Marshville Bypass Build Scenario (in thousands $)

	Collected Toll Revenue									Processing	Total
Fiscal	Class 1			Classes 2 and 3			All Vehicles			Fee	Collected
Year	BBM	ETC	Total	BBM	ETC	Total	BBM	ETC	Total	Revenue	Revenue
2035	$15,400	$18,017	$33,417	$3,500	$11,637	$15,137	$18,901	$29,654	$48,554	$3,179	$51,734
2036	16,683	19,948	36,631	3,859	12,945	16,803	20,542	32,892	53,434	3,223	56,657
2037	17,005	20,733	37,737	3,964	13,424	17,388	20,968	34,157	55,125	3,217	58,342
2038	17,248	21,557	38,804	4,071	13,922	17,993	21,319	35,479	56,798	3,211	60,008
2039	17,496	22,412	39,908	4,186	14,438	18,624	21,682	36,850	58,532	3,205	61,737
2040	17,882	23,290	41,173	4,306	14,982	19,287	22,188	38,272	60,460	3,199	63,659
2041	18,236	24,169	42,406	4,412	15,517	19,929	22,648	39,686	62,335	3,198	65,533
2042	18,553	25,047	43,601	4,506	16,031	20,538	23,060	41,078	64,138	3,203	67,342
2043	18,973	25,945	44,918	4,602	16,559	21,160	23,575	42,503	66,078	3,209	69,287
2044	19,415	26,871	46,285	4,701	17,102	21,803	24,115	43,973	68,088	3,214	71,302
2045	19,851	27,811	47,662	4,805	17,665	22,470	24,656	45,477	70,133	3,219	73,352
2046	20,237	28,743	48,980	4,900	18,222	23,121	25,137	46,965	72,101	3,219	75,320
2047	20,609	29,672	50,282	4,983	18,770	23,752	25,592	48,442	74,034	3,212	77,246
2048	20,994	30,627	51,621	5,064	19,335	24,399	26,057	49,962	76,019	3,206	79,225
2049	21,386	31,627	53,014	5,149	19,918	25,067	26,535	51,546	78,081	3,200	81,280
2050	21,758	32,650	54,408	5,237	20,518	25,754	26,995	53,167	80,162	3,193	83,355
2051	22,113	33,704	55,817	5,317	21,136	26,453	27,430	54,840	82,270	3,186	85,456
2052	22,545	34,810	57,355	5,394	21,776	27,170	27,939	56,585	84,525	3,176	87,701
2053	22,931	35,956	58,887	5,472	22,434	27,906	28,403	58,390	86,793	3,167	89,960
2054	23,311	37,105	60,416	5,550	23,112	28,661	28,861	60,217	89,078	3,158	92,236
2055	23,694	38,288	61,982	5,627	23,813	29,440	29,321	62,101	91,421	3,149	94,571
2056	24,069	39,526	63,594	5,709	24,531	30,240	29,778	64,057	93,835	3,140	96,975
2057	24,518	40,793	65,311	5,794	25,270	31,064	30,312	66,064	96,375	3,131	99,507
2058	24,898	42,115	67,013	5,876	26,036	31,912	30,775	68,151	98,925	3,122	102,048
2059	25,253	43,396	68,648	5,967	26,820	32,787	31,219	70,216	101,435	3,113	104,548
2060	25,638	44,772	70,409	6,075	27,612	33,687	31,713	72,383	104,096	3,103	107,199
2061	26,044	46,214	72,258	6,188	28,435	34,623	32,232	74,649	106,881	3,094	109,975
2062	26,476	47,738	74,214	6,301	29,278	35,579	32,777	77,016	109,793	3,084	112,877
2063	26,883	49,261	76,144	6,418	30,152	36,570	33,301	79,413	112,714	3,074	115,788
2064	27,259	50,762	78,021	6,537	31,053	37,590	33,797	81,815	115,611	3,065	118,676
2065	27,679	52,376	80,055	6,654	31,958	38,613	34,333	84,335	118,668	3,055	121,723
2066	28,104	54,039	82,143	6,777	32,910	39,688	34,882	86,950	121,831	3,046	124,877
2067	28,497	55,689	84,186	6,902	33,889	40,792	35,399	89,579	124,978	3,036	128,014
2068	28,937	57,465	86,402	7,027	34,882	41,909	35,964	92,347	128,311	3,027	131,338

Table 5 – Transaction and Revenue Forecast Comparison: 2025 T&R Update Study and Marshville Bypass Build Scenario

	Estimated Annual Transactions (000)				Estimated Annual Collected Revenue ($000)			
Fiscal Year	2025 T&R Update	Current Study	Difference	Percent Difference	2025 T&R Update	Current Study	Difference	Percent Difference
2035	59,954	63,916	3,962	6.6%	$48,451	$51,734	$3,282	6.8%
2036	60,715	68,712	7,997	13.2%	49,861	56,657	6,797	13.6%
2037	61,491	69,563	8,072	13.1%	51,319	58,342	7,023	13.7%
2038	62,282	70,430	8,148	13.1%	52,828	60,008	7,180	13.6%
2039	63,090	71,315	8,225	13.0%	54,390	61,737	7,347	13.5%
2040	63,913	72,217	8,304	13.0%	56,006	63,659	7,653	13.7%
2041	64,693	73,083	8,391	13.0%	57,634	65,533	7,899	13.7%
2042	65,425	73,910	8,486	13.0%	59,270	67,342	8,072	13.6%
2043	66,167	74,749	8,582	13.0%	60,957	69,287	8,330	13.7%
2044	66,920	75,599	8,679	13.0%	62,696	71,302	8,606	13.7%
2045	67,683	76,462	8,778	13.0%	64,490	73,352	8,862	13.7%
2046	68,346	77,211	8,864	13.0%	66,229	75,320	9,090	13.7%
2047	68,907	77,844	8,937	13.0%	67,909	77,246	9,337	13.7%
2048	69,474	78,484	9,010	13.0%	69,636	79,225	9,589	13.8%
2049	70,049	79,133	9,085	13.0%	71,413	81,280	9,867	13.8%
2050	70,630	79,790	9,160	13.0%	73,240	83,355	10,115	13.8%
2051	71,210	80,445	9,235	13.0%	75,105	85,456	10,351	13.8%
2052	71,789	81,099	9,310	13.0%	77,009	87,701	10,692	13.9%
2053	72,375	81,761	9,386	13.0%	78,968	89,960	10,992	13.9%
2054	72,969	82,431	9,463	13.0%	80,983	92,236	11,253	13.9%
2055	73,570	83,110	9,541	13.0%	83,055	94,571	11,516	13.9%
2056	74,179	83,798	9,619	13.0%	85,187	96,975	11,788	13.8%
2057	74,795	84,494	9,699	13.0%	87,380	99,507	12,127	13.9%
2058	75,420	85,200	9,780	13.0%	89,636	102,048	12,412	13.8%
2059	76,021	85,879	9,858	13.0%	91,826	104,548	12,722	13.9%
2060	76,617	86,552	9,936	13.0%	94,149	107,199	13,050	13.9%
2061	77,220	87,234	10,014	13.0%	96,581	109,975	13,394	13.9%
2062	77,830	87,923	10,093	13.0%	99,123	112,877	13,753	13.9%
2063	78,448	88,622	10,174	13.0%	101,674	115,788	14,114	13.9%
2064	79,074	89,329	10,255	13.0%	104,204	118,676	14,472	13.9%
2065	79,707	90,045	10,337	13.0%	106,873	121,723	14,849	13.9%
2066	80,349	90,769	10,421	13.0%	109,637	124,877	15,240	13.9%
2067	80,998	91,503	10,505	13.0%	112,385	128,014	15,629	13.9%
2068	81,655	92,245	10,591	13.0%	115,297	131,338	16,041	13.9%

Traffic Impacts on US 74 in Marshville

Upon the opening of the Marshville Bypass, traffic is expected to divert from the existing toll-free US 74 that runs through Marshville. **Table 6** provides the estimated average weekday traffic by vehicle class for two locations on US 74 under the no-build and build conditions for model assignment years 2030 and 2040. Class 1 represents two-axle vehicles and Classes 2 & 3 represent vehicles with three-or-more axles. The table also includes the percent difference in traffic between the no-build and build conditions to illustrate the impact of the Marshville Bypass.

Table 6 – Estimated US 74 Average Weekday Traffic Impacts by Vehicle Class, No-Build vs. Build Condition

Model Year	Location	Vehicle Class	No Build	Build	Impact to US 74
2030	US 74 to N Elm St	Class 1	27,900	19,100	-31.5%
		Classes 2&3	2,900	1,600	-44.8%
		Total	30,800	20,700	-32.8%
	N White St to Belk St	Class 1	24,800	16,200	-34.7%
		Classes 2&3	3,000	1,700	-43.3%
		Total	27,800	17,900	-35.6%
2040	US 74 to N Elm St	Class 1	30,500	21,000	-31.1%
		Classes 2&3	3,200	1,700	-46.9%
		Total	33,700	22,700	-32.6%
	N White St to Belk St	Class 1	27,400	17,800	-35.0%
		Classes 2&3	3,300	1,800	-45.5%
		Total	30,700	19,600	-36.2%

Disclaimer

CDM Smith used currently-accepted professional practices and procedures in the development of the traffic and revenue estimates in this report. However, as with any forecast, it should be understood that differences between forecasted and actual results may occur, as caused by events and circumstances beyond the control of the forecasters. In formulating the estimates, CDM Smith reasonably relied upon the accuracy and completeness of information provided (both written and oral) by the NCTA. CDM Smith also relied upon the reasonable assurances of independent parties and is not aware of any material facts that would make such information misleading.

CDM Smith made qualitative judgments related to several key variables in the development and analysis of the traffic and revenue estimates that must be considered as a whole; therefore, selecting portions of any individual result without consideration of the intent of the whole may create a misleading or incomplete view of the results and the underlying methodologies used to obtain the results. CDM Smith gives no opinion as to the value or merit of partial information extracted from this report.

All estimates and projections reported herein are based on CDM Smith's experience and judgment and on a review of information obtained from multiple agencies, including NCTA. These estimates and projections may not be indicative of actual or future values, and are therefore subject to substantial uncertainty. Certain variables such as future developments, economic cycles, pandemics, government actions, climate change related events, or impacts related to advances in automotive technology etc. cannot be predicted with certainty and may affect the estimates or projections expressed in this report, such that CDM Smith does not specifically guarantee or warrant any estimate or projection contained within this report.

While CDM Smith believes that the projections and other forward-looking statements contained within the report are based on reasonable assumptions as of the date of the report, such forward-looking statements involve risks and uncertainties that may cause actual results to differ materially from the results predicted. Therefore, following the date of this report, CDM Smith will take no responsibility or assume any obligation to advise of changes that may affect its assumptions contained within the report, as they pertain to socioeconomic and demographic forecasts, proposed residential or commercial land use development projects and/or potential improvements to the regional transportation network.

The report and its contents are intended solely for use by the NCTA and designated parties approved by NCTA and CDM Smith. Any use by third-parties, other than as noted above, is expressly prohibited. In addition, any publication of the report without the express written consent of CDM Smith is prohibited.

CDM Smith is not, and has not been, a municipal advisor as defined in Federal law (the Dodd Frank Bill) to NCTA and does not owe a fiduciary duty pursuant to Section 15B of the Exchange Act to NCTA with respect to the information and material contained in this report. CDM Smith is not recommending and has not recommended any action to NCTA. NCTA should discuss the information and material contained in this report with any and all internal and external advisors that it deems appropriate before acting on this information.

I. Sources and Uses

Sources	Senior Lien Toll Rev. Bonds	Subordinated Toll Rev. TIFIA Loan	Trust Fund Funding	Funding Gap	Total
Tax-Exempt Governmental Purpose Bonds					
Current Interest Bonds (Par)	123,450,000				123,450,000
Capital Appreciation Bonds					-
Convertible Capital Appreciation Bonds (Par)	-				-
+Premium/-Discount	4,524,931				4,524,931
Total Bond Proceeds	127,974,931				127,974,931
TIFIA Loan		196,991,754			196,991,754
Trust Fund Funding					-
Funding Gap	-		-	71,738,968	71,738,968
Total Sources	127,974,931	196,991,754	-	71,738,968	396,705,653

Uses	Senior Lien Toll Rev. Bonds	Subordinated Toll Rev. TIFIA Loan	Trust Fund Funding	Funding Gap	Total
Construction Cost*	64,496,478	196,991,754	-	71,738,968	333,227,200
Capitalized Interest Fund - Toll Rev. Bonds	36,121,503				36,121,503
Debt Service Reserve Fund - Toll Rev. Bonds	8,888,159				8,888,159
Debt Service Reserve Fund - Toll Rev. TIFIA Loan*	17,542,916				17,542,916
Underwriter's Discount	617,250				617,250
Cost of Issuance	308,625				308,625
Tolling Reserve					-
Additional Proceeds	-				-
Total Uses	127,974,931	196,991,754	-	71,738,968	396,705,653
Check	-	-	-	-	-

*Under the current tax law, TIFIA DSRF may not be funded by TE Bonds proceeds. Model assumes a small taxable traunche of bonds is issued.

TIFIA Loan Amount Estimate	
Total Construction Cost	333,227,200
Financing Cost	
Toll Revenue Bonds - Capitalized Interest Fund	36,121,503
Toll Revenue Bonds - Debt Service Reserve Fund	8,888,159
Toll Revenue Bonds - Cost of Issuance	308,625
Sub-total	45,318,287
Engineering and Prior Expenditures	23,478,500
Total Eligible Cost	402,023,987
% of Eligible Cost	49%
Constraint - 49% Eligible Cost	196,991,754
Portion Requested	100%
Requested TIFIA	196,991,754

Funding Gap ($YOE)	$71,738,968	2030
PV Gap (2025$)	$56,209,359	2025

II. Toll Revenue Bonds Debt Service and Coverage Ratios

Fiscal Year (6/30)	(Senior Lien) Bonds Net DS	Marshville Toll Revenue Projected Debt Service	TIFIA Loan (Mandatory Payments)	Marshville TIFIA Projected Debt Service	Project Revenues (Projections excl. Excess Appr.)	Bonds Coverage	TIFIA Coverage	All-in Coverage
2015								
2016		-			-			
2017	(58,958)	-			-			
2018	(117,916)	-			-			
2019	(101,722)	-		-	7,261,270			1.13x
2020	4,420,049	-	-	-	23,253,326	5.26x	5.26x	1.22x
2021	5,968,594	-	2,347,252	-	22,472,302	3.77x	2.70x	1.06x
2022	5,967,433	-	2,153,661	-	27,108,263	4.54x	3.34x	1.02x
2023	6,929,524	-	3,915,748	-	32,746,736	4.73x	3.02x	1.02x
2024	5,730,680	-	6,079,547	-	38,405,715	6.70x	3.25x	1.01x
2025	5,822,054	-	6,607,678	-	44,213,838	7.59x	3.56x	1.01x
2026	6,827,263	-	6,809,483	-	39,656,687	5.81x	2.91x	1.01x
2027	7,027,263	-	7,030,026	-	40,496,213	5.76x	2.88x	1.14x
2028	7,497,263	-	7,030,026	-	41,489,172	5.53x	2.86x	1.14x
2029	7,542,263	-	7,420,366	-	42,558,269	5.64x	2.84x	1.18x
2030	7,727,263	3,394,875	7,591,725	-	43,677,120	3.93x	2.33x	1.09x
2031	7,862,263	6,789,750	7,809,340	-	44,923,382	3.07x	2.00x	1.01x
2032	8,087,263	6,789,750	8,032,614	-	46,279,727	3.11x	2.02x	1.02x
2033	8,312,263	6,789,750	8,268,380	-	47,688,354	3.16x	2.04x	1.02x
2034	8,547,263	6,789,750	8,518,197	-	49,150,076	3.20x	2.06x	1.01x
2035	8,817,263	6,789,750	8,765,087	-	53,933,624	3.46x	2.21x	0.99x
2036	9,072,263	6,789,750	9,022,322	-	58,986,402	3.72x	2.37x	1.03x
2037	9,312,263	6,789,750	9,310,783	2,808,127	60,711,273	3.77x	2.15x	1.02x
2038	9,647,263	6,789,750	9,573,872	5,719,408	62,417,448	3.80x	1.97x	1.02x
2039	9,907,263	6,789,750	9,856,283	5,859,758	64,186,126	3.84x	1.98x	1.01x
2040	10,197,263	6,789,750	10,150,600	9,023,519	66,147,734	3.89x	1.83x	1.01x
2041	10,537,263	6,789,750	10,416,812	12,079,873	68,061,858	3.93x	1.71x	0.97x
2042	10,802,500	6,789,750	10,704,883	12,079,873	70,180,031	3.99x	1.74x	1.02x
2043	11,092,000	6,789,750	11,008,567	12,079,873	72,165,319	4.04x	1.76x	1.02x
2044	11,399,750	6,789,750	11,325,524	12,079,873	74,220,526	4.08x	1.78x	1.01x
2045	11,743,500	6,789,750	11,636,039	12,079,873	76,309,968	4.12x	1.81x	1.01x
2046	12,090,000	6,789,750	11,932,698	12,079,873	78,318,118	4.15x	1.83x	1.00x
2047	12,397,500	6,789,750	12,239,895	12,079,873	80,284,599	4.18x	1.85x	1.00x
2048	12,711,250	6,789,750	12,560,755	12,079,873	82,303,614	4.22x	1.86x	1.00x
2049	13,059,250	6,789,750	12,874,783	12,079,873	84,409,156	4.25x	1.88x	1.01x
2050	13,728,000	6,789,750	12,874,783	12,079,873	86,547,399	4.22x	1.90x	1.01x
2051	13,984,500	6,789,750	13,271,564	12,079,873	88,721,304	4.27x	1.92x	1.01x
2052	14,026,500	6,789,750	13,925,384	12,079,873	91,054,325	4.37x	1.94x	0.99x
2053	14,497,750	6,789,750	14,246,439	12,079,873	93,377,400	4.39x	1.96x	1.02x
2054	14,495,250	6,789,750	-	12,079,873	95,772,370	4.50x	2.87x	1.16x
2055	-	10,504,750	-	17,519,414	98,401,401	9.37x	3.51x	1.20x
2056	-	10,770,425	-	22,958,954	101,135,988	9.39x	3.00x	1.17x
2057	-	11,055,250	-	22,958,954	103,956,319	9.40x	3.06x	1.05x
2058	-	11,336,750	-	22,958,954	106,587,646	9.40x	3.11x	1.18x
2059	-	11,613,550	-	22,958,954	109,413,687	9.42x	3.16x	1.39x
2060	-	11,909,275	-	22,958,954	112,675,128	9.46x	3.23x	1.47x
2061	-	12,216,175	-	22,958,954	116,170,670	9.51x	3.30x	1.49x
2062	-	12,541,775	-	22,958,954	119,837,204	9.56x	3.38x	1.51x
2063	-	12,863,050	-	22,958,954	123,560,743	9.61x	3.45x	1.53x
2064	-	13,183,075	-	22,958,954	127,308,674	9.66x	3.52x	1.55x
2065	-	13,524,650	-	22,958,954	131,263,827	9.71x	3.60x	1.45x
2066	-	13,874,200	-	22,958,954	135,235,154	9.75x	3.67x	1.60x
2067	-	14,223,700	-	22,958,954	139,383,389	9.80x	3.75x	1.62x
2068	-	14,590,400	-	22,958,954	143,771,280	9.85x	3.83x	1.64x
2069	-	14,970,450	-	22,958,954	148,303,030	9.91x	3.91x	1.68x
2070	-	-	-	22,882,343	152,998,371		6.69x	2.07x
2071	-	-	-	-	158,167,442			2.90x
2072	-	-	-	-	163,920,582			2.96x
2073	-	-	-	-	169,869,991			3.03x
2074	-	-	-	-	176,021,584			3.10x
2075	-	-	-	-	182,381,445			4.58x
Total	*337,508,689*	*355,526,350*	*305,311,117*		*4,889,338,002*			
Minimum Coverage:						3.07x	1.71x	0.97x
Average Coverage:						5.94x	2.76x	1.36x
TIFIA Loan Rate Coverage Requirement:						1.35x	1.25x	1.00x
Resolution Rate Covenant Requirement:						1.35x	1.25x	1.00x

Rate Covenant / Rate Coverage Test

Senior Debt Service Coverage	Total Debt Service Coverage	TIFIA Loan Life Coverage Ratio	Deposits Req. in Sect. 8(d) (i) - (ix)[1] w. Ramp-Up for 5 Yrs[2]	Deposits Req. in Sect. 8(d) (i) - (ix)[1] w/o Ramp-Up
			1.13x	
5.26x	5.26x	3.13x	2.62x	
3.77x	2.70x	3.15x	2.31x	
4.54x	3.34x	3.17x	2.02x	
4.73x	3.02x	3.19x	1.85x	
6.70x	3.25x	3.23x		1.10x
7.59x	3.56x	3.25x		1.06x
5.81x	2.91x	3.24x		1.05x
5.76x	2.88x	3.26x		1.19x
5.53x	2.86x	3.28x		1.19x
5.64x	2.84x	3.30x		1.23x
5.65x	2.85x	3.32x		1.23x
5.71x	2.87x	3.34x		1.24x
5.72x	2.87x	3.36x		1.24x
5.74x	2.88x	3.37x		1.24x
5.75x	2.88x	3.39x		1.21x
6.12x	3.07x	3.41x		1.17x
6.50x	3.26x	3.41x		1.20x
6.52x	2.83x	3.40x		1.26x
6.47x	2.50x	3.38x		1.32x
6.48x	2.50x	3.36x		1.30x
6.49x	2.25x	3.34x		1.37x
6.46x	2.06x	3.30x		2.00x
6.50x	2.09x	3.26x		1.41x
6.51x	2.11x	3.26x		1.38x
6.51x	2.13x	3.26x		1.36x
6.50x	2.15x	3.26x		1.34x
6.48x	2.17x	3.26x		1.32x
6.48x	2.19x	3.26x		1.30x
6.47x	2.20x	3.26x		1.30x
6.46x	2.22x	3.26x		1.30x
6.30x	2.24x	3.25x		1.30x
6.34x	2.26x	3.26x		1.29x
6.49x	2.27x	3.29x		1.25x
6.44x	2.29x	3.34x		1.28x
6.61x	3.60x	0.00x		1.51x
	5.62x			1.83x
	4.41x			1.91x
	4.53x			1.59x
	4.64x			1.90x
	4.77x			2.47x
	4.91x			2.70x
	5.06x			2.72x
	5.22x			2.74x
	5.38x			2.76x
	5.55x			2.78x
	5.72x			2.44x
	5.89x			2.82x
	6.07x			2.85x
	6.26x			2.87x
	6.46x			2.94x
	6.69x			2.99x
				2.90x
				2.96x
				3.03x
				3.10x
				4.58x
3.77x	2.06x	0.00x	1.85x	1.05x
6.09x	3.58x	3.19x	2.20x	1.86x
1.35x	1.25x	1.30x	1.00x	1.00x
1.35x	1.25x	n/a	n/a	n/a

1. Deposits are calculated net of amounts expected to be in the particular funds, included interest earnings and other amounts such as excess appropriation revenues.
2. Per Section 16(n)(iii) of the TIFIA Loan Agreement, balances in the Ramp-up Reserve shall be credited to the calculation to the extent necessary to comply with the ratios within the Rate Coverage Test for the five yea

IV. Toll Revenue Flow of Funds

Assumes all Mandatory

Fiscal Year (6/30)	Aggregate Revenue							Series 2016 Toll Revenue Bonds	Marshville Toll Revenue Debt Service	TIFIA Loan (Mandatory Payments)	Marshville TIFIA Loan	O&M and R&R Expenses and Reserve				Excess Revenue/ Shortfall	TIFIA Loan (Scheduled Payments)	Excess Revenue after Prepayment
	Toll Revenue	Surplus App Revenue	Prior Bond Fund Int (a/o 9/30/2016)[1]	Toll Rev. Bond DSRF Earnings	TIFIA DSRF Earnings	Pledged Acct. Earnings	Total Revenues	Net DS	Debt Service	Debt Service	Debt Service	Operations & Maintenance Expense	O&M Expense Prefund/ Earnings Adj.	O&M Reserve[2]	R&R Deposit		Debt Service	
2011		26,929,079					26,929,079									26,929,079		26,929,079
2012		742,454					742,454									1,765		1,765
2013		803,881					803,881											
2014		678,068					678,068											
2015		692,046					692,046											
2016		696,777	1,056,951				1,753,727									1,056,951		1,056,951
2017		696,223			183,891		880,113							(1,154,125)		841,115		841,115
2018		710,134			367,782		1,077,916								(1,000,000)	77,916		77,916
2019	6,516,170	723,600			21,500		7,261,270					(2,843,312)	(1,177,893)	(1,510,396)	(984,568)	745,101		745,101
2020	21,335,260	903,989			513,525	500,553	23,253,326	($4,420,049)				(9,502,204)		(824,576)	(4,272,211)	4,234,287		4,234,287
2021	20,950,428	978,533			63,267	480,074	22,472,302	($5,968,594)		($2,528,795)		(11,204,940)		(238,603)	(1,470,915)	1,060,456		1,060,456
2022	27,023,684			65,433	17,915	66,664	27,173,697	(6,062,433)		(2,298,064)		(12,532,450)	(1,254,082)	(321,120)	(4,395,177)	310,370		310,370
2023	29,024,789	3,042,870		179,738	107,977	571,100	32,926,474	(6,929,524)		(4,178,315)		(14,716,742)	529,918		(7,104,225)	527,586		527,586
2024	34,490,420	3,041,104		181,583	86,287	787,904	38,587,298	(5,730,680)		(5,914,750)		(14,498,076)	(1,864,768)	322,656	(10,062,520)	839,159		839,159
2025	41,483,938	2,032,652		90,208	95,559	601,689	44,304,046	(5,822,054)		(6,528,936)		(16,162,032)	(1,722,265)		(13,467,069)	601,689		601,689
2026	38,520,747	1,448,500		255,487	268,374	612,079	41,105,187	(6,843,929)		(6,809,483)		(16,706,467)			(8,745,307)	2,000,000		2,000,000
2027	39,320,273	1,435,875		255,487	268,374	652,079	41,932,088	(7,066,429)		(7,030,026)		(16,523,254)			(5,027,724)	6,284,655		6,284,655
2028	40,187,539	1,434,375		255,487	268,374	777,772	42,923,547	(7,501,013)		(7,030,026)		(16,636,309)			(5,224,978)	6,531,222		6,531,222
2029	41,126,012	1,425,000		255,487	268,374	908,396	43,983,269	(7,557,679)		(10,090,605)		(16,844,569)			(4,217,963)	5,272,454		5,272,454
2030	42,139,414	1,419,250		255,487	268,374	1,013,845	45,096,370	(7,738,513)		(10,090,605)		(16,850,568)			(4,629,638)	5,787,047		5,787,047
2031	43,269,934	1,413,500		255,487	268,374	1,129,586	46,336,882	(7,881,013)		(10,090,605)		(17,012,268)			(5,045,776)	6,307,220		6,307,220
2032	44,500,135	1,399,125		255,487	268,374	1,255,731	47,678,852	(8,106,013)		(10,090,387)		(17,240,166)			(5,441,016)	6,801,270		6,801,270
2033	45,772,737	1,398,250		255,487	268,374	1,391,756	49,086,604	(8,331,846)		(10,090,605)		(17,496,127)		(57,027)	(5,852,456)	7,258,543		7,258,543
2034	47,089,288	1,386,750		255,487	268,374	1,536,927	50,536,826	(8,569,763)		(10,090,604)		(17,806,250)		(77,531)	(7,035,104)	6,957,574		6,957,574
2035	51,733,685	1,386,875		255,487	268,374	1,676,079	55,320,499	(8,838,513)		(10,090,604)		(21,584,039)		(944,447)	(7,403,672)	6,459,224		6,459,224
2036	56,657,278	1,374,875		255,487	268,374	1,805,263	60,361,277	(9,092,263)	(6,789,750)	(10,090,386)		(22,971,121)		(346,770)	(9,070,987)	2,000,000		2,000,000
2037	58,342,149	1,363,125		255,487	268,374	1,845,263	62,074,398	(9,340,179)	(6,789,750)	(10,090,604)	(2,808,127)	(23,381,689)		(102,642)	(7,561,406)	2,000,000		2,000,000
2038	60,008,324	1,353,625		255,487	268,374	1,885,263	63,771,073	(9,668,929)	(6,789,750)	(10,090,604)	(5,719,408)	(23,801,964)		(105,069)	(5,595,348)	2,000,000		2,000,000
2039	61,737,002	1,343,250		255,487	268,374	1,925,263	65,529,376	(9,931,429)	(6,789,750)	(10,090,604)	(5,859,758)	(24,232,198)		(107,558)	(6,518,079)	2,000,000		2,000,000
2040	63,658,610	1,334,375		255,487	268,374	1,965,263	67,482,109	(10,225,596)	(6,789,750)	(10,090,384)	(9,023,519)	(24,672,649)		(110,113)	(4,570,099)	2,000,000		2,000,000
2041	65,532,734	17,529,250		255,487	268,374	2,005,263	85,591,108	(10,559,366)	(6,789,750)	(10,090,605)	(12,079,873)	(25,131,095)		(114,612)	(5,365,085)	15,460,723		15,460,723
2042	67,341,693			255,487	268,374	2,314,477	70,180,031	(10,826,625)	(6,789,750)	(10,090,605)	(12,079,873)	(25,607,463)		(119,092)	(2,666,624)	2,000,000		2,000,000
2043	69,286,981			255,487	268,374	2,354,477	72,165,319	(11,117,646)	(6,789,750)	(10,090,605)	(12,079,873)	(26,093,976)		(121,628)	(3,871,842)	2,000,000		2,000,000
2044	71,302,188			255,487	268,374	2,394,477	74,220,526	(11,428,396)	(6,789,750)	(10,090,381)	(12,079,873)	(26,590,866)		(124,222)	(5,117,039)	2,000,000		2,000,000
2045	73,351,630			255,487	268,374	2,434,477	76,309,968	(11,772,375)	(6,789,750)	(10,090,606)	(12,079,873)	(27,098,370)		(126,876)	(6,352,118)	2,000,000		2,000,000
2046	75,319,779			255,487	268,374	2,474,477	78,318,118	(12,115,625)	(6,789,750)	(10,090,606)	(12,079,873)	(27,582,027)		(120,914)	(7,539,323)	2,000,000		2,000,000
2047	77,246,261			255,487	268,374	2,514,477	80,284,599	(12,423,646)	(6,789,750)	(10,090,606)	(12,079,873)	(28,040,724)		(114,674)	(8,745,325)	2,000,000		2,000,000
2048	79,225,275			255,487	268,374	2,554,477	82,303,614	(12,740,250)	(6,789,750)	(10,090,375)	(12,079,873)	(28,508,693)		(116,992)	(9,442,211)	2,535,469		2,535,469
2049	81,280,109			255,487	268,374	2,605,187	84,409,156	(13,114,979)	(6,789,750)	(10,090,612)	(12,079,873)	(28,986,139)		(119,361)	(10,068,777)	3,159,666		3,159,666
2050	83,355,158			255,487	268,374	2,668,380	86,547,399	(13,749,375)	(6,789,750)	(10,090,614)	(12,079,873)	(29,473,270)		(121,783)	(10,577,134)	3,665,601		3,665,601
2051	85,455,751			255,487	268,374	2,741,692	88,721,304	(13,988,000)	(6,789,750)	(10,090,620)	(12,079,873)	(29,964,807)		(122,884)	(11,299,002)	4,386,367		4,386,367
2052	87,701,045			255,487	268,374	2,829,420	91,054,325	(14,065,771)	(6,789,750)	(10,090,358)	(12,079,873)	(30,460,838)		(124,008)	(14,235,695)	3,208,033		3,208,033
2053	89,959,959			255,487	268,374	2,893,580	93,377,400	(14,497,542)	(6,789,750)	(10,090,289)	(12,079,873)	(30,967,051)		(126,553)	(12,871,323)	5,955,019		5,955,019
2054	92,235,829			255,487	268,374	3,012,681	95,772,370	(13,287,313)	(6,789,750)		(12,079,873)	(31,483,676)		(129,156)	(17,298,448)	14,704,154		14,704,154
2055	94,570,776			255,487	268,374	3,306,764	98,401,401		(10,504,750)		(17,519,414)	(32,010,946)		(131,817)	(21,720,463)	16,514,011		16,514,011
2056	96,975,083			255,487	268,374	3,637,044	101,135,988		(10,770,425)		(22,958,954)	(32,549,098)		(134,538)	(20,279,083)	14,443,890		14,443,890
2057	99,506,536			255,487	268,374	3,925,922	103,956,319		(11,055,250)		(22,958,954)	(33,098,376)		(137,320)	(32,202,364)	4,504,055		4,504,055
2058	102,047,783			255,487	268,374	4,016,003	106,587,646		(11,336,750)		(22,958,954)	(33,659,031)		(140,164)	(22,208,738)	16,284,009		16,284,009
2059	104,548,143			255,487	268,374	4,341,683	109,413,687		(11,613,550)		(22,958,954)	(34,223,238)		(141,052)	(9,964,558)	30,512,333		30,512,333
2060	107,199,337			255,487	268,374	4,951,930	112,675,128		(11,909,275)		(22,958,954)	(34,795,501)		(143,066)	(6,865,084)	36,003,247		36,003,247
2061	109,974,815			255,487	268,374	5,671,995	116,170,670		(12,216,175)		(22,958,954)	(35,379,554)		(146,013)	(7,229,020)	38,240,953		38,240,953
2062	112,876,529			255,487	268,374	6,436,814	119,837,204		(12,541,775)		(22,958,954)	(35,975,660)		(149,027)	(7,612,824)	40,598,964		40,598,964
2063	115,788,090			255,487	268,374	7,248,793	123,560,743		(12,863,050)		(22,958,954)	(36,584,090)		(152,107)	(8,002,212)	43,000,329		43,000,329
2064	118,676,014			255,487	268,374	8,108,799	127,308,674		(13,183,075)		(22,958,954)	(37,205,120)		(155,257)	(8,393,075)	45,413,193		45,413,193
2065	121,722,903			255,487	268,374	9,017,063	131,263,827		(13,524,650)		(22,958,954)	(37,839,031)		(158,478)	(15,907,287)	40,875,426		40,875,426
2066	124,876,721			255,487	268,374	9,834,572	135,235,154		(13,874,200)		(22,958,954)	(38,486,114)		(161,771)	(9,223,761)	50,530,354		50,530,354
2067	128,014,349			255,487	268,374	10,845,179	139,383,389		(14,223,700)		(22,958,954)	(39,146,665)		(165,138)	(9,659,721)	53,229,211		53,229,211
2068	131,337,656			255,487	268,374	11,909,763	143,771,280		(14,590,400)		(22,958,954)	(39,820,985)		(168,580)	(10,123,918)	56,108,443		56,108,443
2069	134,747,237			255,487	268,374	13,031,932	148,303,030		(14,970,450)		(22,958,954)	(39,820,985)			(10,690,386)	59,862,255		59,862,255
2070	138,245,333			255,487	268,374	14,229,177	152,998,371				(22,882,343)	(39,820,985)			(11,286,880)	79,008,163		79,008,163
2071	141,834,241			255,487	268,374	15,809,340	158,167,442					(39,820,985)			(14,793,307)	103,553,150		103,553,150
2072	145,516,318			255,487	268,374	17,880,403	163,920,582					(39,820,985)			(15,512,450)	108,587,148		108,587,148
2073	149,293,983			255,487	268,374	20,052,146	169,869,991					(39,820,985)			(16,256,126)	113,792,880		113,792,880
2074	153,169,719			255,487	268,374	22,328,004	176,021,584					(39,820,985)			(17,025,075)	119,175,524		119,175,524
2075	157,146,070			255,487	268,374	24,711,514	182,381,445					(39,820,985)				142,560,461		142,560,461
2076	161,225,649			255,487	268,374	27,562,724	189,312,233					(39,820,985)				149,491,249		149,491,249
Total	4,762,775,494	81,117,411		13,546,791	15,144,775	308,043,657	5,181,685,078	(337,313,345)	(318,182,725)	(294,581,874)	(554,356,150)	(1,590,549,679)		(9,364,406)	(535,102,513)			

1. Earnings from the Capitalized Interest and Debt Service Reserve Accounts for the Series 2010 Appropriation Bonds.
2. O&M Reserve Initial deposit made with transfer from the General Reserve Fund Pledged Account.

FY 2019 Update Notes: Due to erroneous transfers/lack of transfers per the Trustee, certain amounts shown are based on best approximations and may be reconciled following corrective adjustments made to accounts in FY 2020.
Projected Excess Appropriation; Trustee erroneously did not transfer excess funds to the Revenue Account. Corrective adjustments will be made by the Trustee in FY 2020
Actual earnings amoutns are shown though transfers to revenue fund were not made and amounts remained in respective accounts; Corrective adjustments made after FYE.

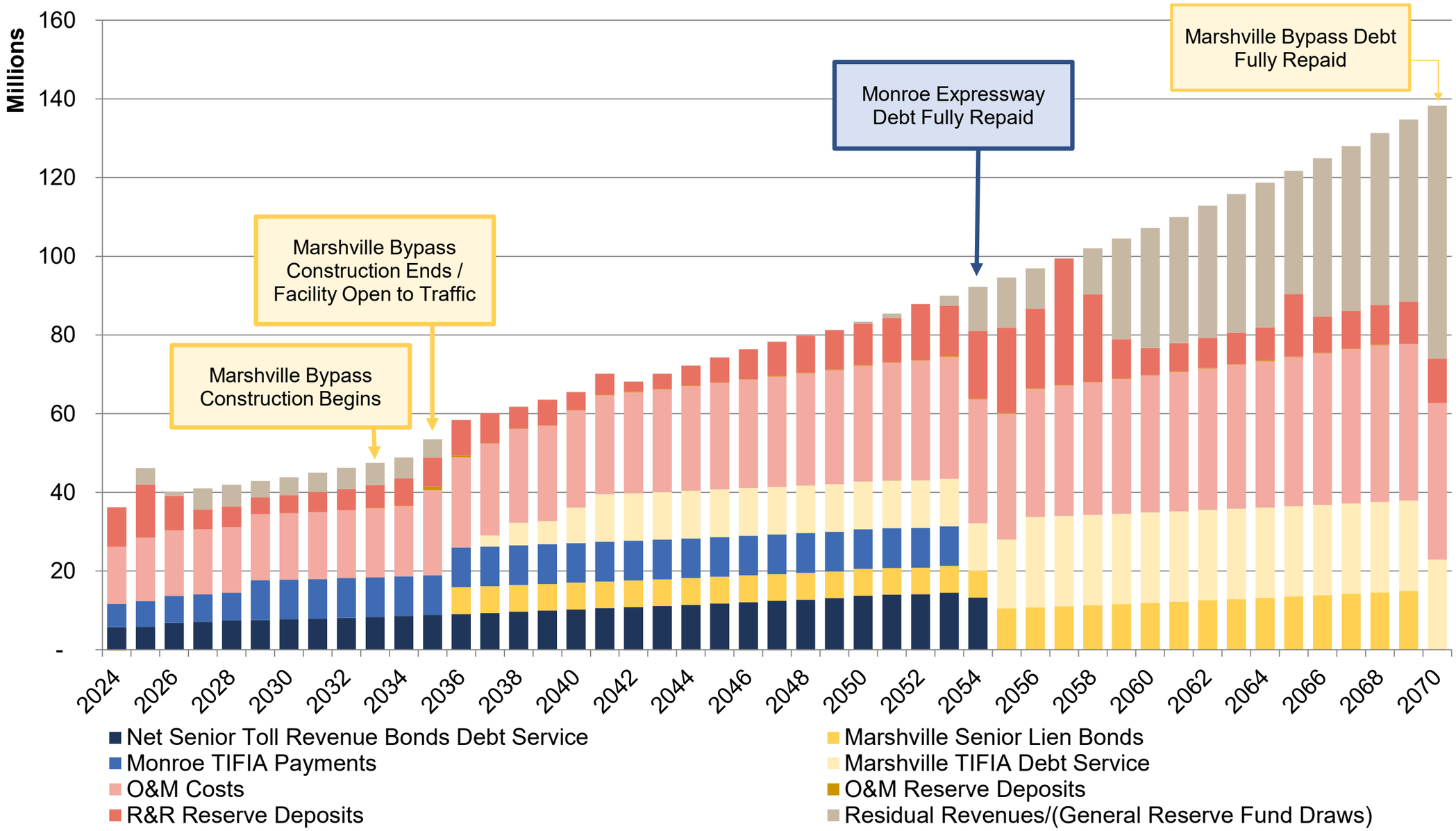
IV. Toll Revenue Flow of Funds

Fiscal Year (6/30)	General Reserve																	
	Ramp-Up Reserve/Restricted Account						Pledged Account							Unpledged Account				
	Beginning Balance	Excess Cash Flow / Actual True Up	Transfers in/ (out)[3]	Interest Earnings/Actual True-Up	Release to Revenue Fund	Ending Balance	Beginning Balance	Excess CF/ Dep.from Pledged Acct	Transfers at Fin. Close[4]	Draw to Pay Prior Debt[5]	Interest Earnings[6]	Release to Revenue Fund	Ending Balance	Beginning Balance	Transfers in/ (out)[7]	Interest Earnings[6]	Ending Balance
2011								24,085,760					24,085,760	-		-	-
2012							24,085,760						24,085,760	-		-	-
2013							24,085,760				139,894		24,225,654	-		-	-
2014							24,225,654				166,938		24,392,592	-		-	-
2015							24,392,592				120,334		24,512,926	-		-	-
2016							24,512,926				169,710		24,682,636	-		-	-
2017		841,115	25,000,000			25,841,115	24,682,636		(26,154,125)		1,471,489			-		12,097,969	12,097,969
2018	25,841,115	77,916				25,919,031								12,097,969		61,626	12,159,595
2019	25,919,031	745,101				26,664,132								12,159,595		201,164	12,360,759
2020	26,664,132	4,234,287		500,553	(500,553)	31,215,072								12,360,759		366,180	12,726,939
2021	31,215,072	4,889,842	17,220,223	480,074	(480,074)	53,325,137								12,726,939	13,390,837	87,548	26,205,324
2022	53,325,137	310,370		66,664	(66,664)	53,635,508								26,205,324	(3,968,063)	39,572	22,276,833
2023	53,635,508	527,586		571,100	(571,100)	54,163,093								22,276,833		362,746	22,639,579
2024	54,163,093	839,159	(55,002,252)	787,904	(787,904)			55,002,252					55,002,252	22,639,579		501,333	23,140,912
2025		601,689	(601,689)				55,002,252	601,689	(25,000,000)		601,689	(601,689)	30,603,941	23,140,912	25,000,000	1,209,825	49,350,737
2026		2,000,000	(2,000,000)				30,603,941	2,000,000			612,079	(612,079)	32,603,941	49,350,737		987,015	50,337,752
2027		6,284,655	(6,284,655)				32,603,941	6,284,655			652,079	(652,079)	38,888,596	50,337,752		1,006,755	51,344,507
2028		6,531,222	(6,531,222)				38,888,596	6,531,222			777,772	(777,772)	45,419,818	51,344,507		1,026,890	52,371,397
2029		5,272,454	(5,272,454)				45,419,818	5,272,454			908,396	(908,396)	50,692,272	52,371,397		1,047,428	53,418,825
2030		5,787,047	(5,787,047)				50,692,272	5,787,047			1,013,845	(1,013,845)	56,479,319	53,418,825		1,068,377	54,487,202
2031		6,307,220	(6,307,220)				56,479,319	6,307,220			1,129,586	(1,129,586)	62,786,539	54,487,202		1,089,744	55,576,946
2032		6,801,270	(6,801,270)				62,786,539	6,801,270			1,255,731	(1,255,731)	69,587,809	55,576,946		1,111,539	56,688,485
2033		7,258,543	(7,258,543)				69,587,809	7,258,543			1,391,756	(1,391,756)	76,846,352	56,688,485		1,133,770	57,822,254
2034		6,957,574	(6,957,574)				76,846,352	6,957,574			1,536,927	(1,536,927)	83,803,926	57,822,254		1,156,445	58,978,699
2035		6,459,224	(6,459,224)				83,803,926	6,459,224			1,676,079	(1,676,079)	90,263,150	58,978,699		1,179,574	60,158,273
2036		2,000,000	(2,000,000)				90,263,150	2,000,000			1,805,263	(1,805,263)	92,263,150	60,158,273		1,203,165	61,361,439
2037		2,000,000	(2,000,000)				92,263,150	2,000,000			1,845,263	(1,845,263)	94,263,150	61,361,439		1,227,229	62,588,668
2038		2,000,000	(2,000,000)				94,263,150	2,000,000			1,885,263	(1,885,263)	96,263,150	62,588,668		1,251,773	63,840,441
2039		2,000,000	(2,000,000)				96,263,150	2,000,000			1,925,263	(1,925,263)	98,263,150	63,840,441		1,276,809	65,117,250
2040		2,000,000	(2,000,000)				98,263,150	2,000,000			1,965,263	(1,965,263)	100,263,150	65,117,250		1,302,345	66,419,595
2041		15,460,723	(15,460,723)				100,263,150	15,460,723			2,005,263	(2,005,263)	115,723,873	66,419,595		1,328,392	67,747,987
2042		2,000,000	(2,000,000)				115,723,873	2,000,000			2,314,477	(2,314,477)	117,723,873	67,747,987		1,354,960	69,102,947
2043		2,000,000	(2,000,000)				117,723,873	2,000,000			2,354,477	(2,354,477)	119,723,873	69,102,947		1,382,059	70,485,005
2044		2,000,000	(2,000,000)				119,723,873	2,000,000			2,394,477	(2,394,477)	121,723,873	70,485,005		1,409,700	71,894,706
2045		2,000,000	(2,000,000)				121,723,873	2,000,000			2,434,477	(2,434,477)	123,723,873	71,894,706		1,437,894	73,332,600
2046		2,000,000	(2,000,000)				123,723,873	2,000,000			2,474,477	(2,474,477)	125,723,873	73,332,600		1,466,652	74,799,252
2047		2,000,000	(2,000,000)				125,723,873	2,000,000			2,514,477	(2,514,477)	127,723,873	74,799,252		1,495,985	76,295,237
2048		2,535,469	(2,535,469)				127,723,873	2,535,469			2,554,477	(2,554,477)	130,259,342	76,295,237		1,525,905	77,821,141
2049		3,159,666	(3,159,666)				130,259,342	3,159,666			2,605,187	(2,605,187)	133,419,008	77,821,141		1,556,423	79,377,564
2050		3,665,601	(3,665,601)				133,419,008	3,665,601			2,668,380	(2,668,380)	137,084,608	79,377,564		1,587,551	80,965,116
2051		4,386,367	(4,386,367)				137,084,608	4,386,367			2,741,692	(2,741,692)	141,470,976	80,965,116		1,619,302	82,584,418
2052		3,208,033	(3,208,033)				141,470,976	3,208,033			2,829,420	(2,829,420)	144,679,009	82,584,418	(0)	1,651,688	84,236,106
2053		5,955,019	(5,955,019)				144,679,009	5,955,019			2,893,580	(2,893,580)	150,634,028	84,236,106		1,684,722	85,920,828
2054		14,704,154	(14,704,154)				150,634,028	14,704,154			3,012,681	(3,012,681)	165,338,182	85,920,828		1,718,417	87,639,245
2055		16,514,011	(16,514,011)				165,338,182	16,514,011			3,306,764	(3,306,764)	181,852,194	87,639,245		1,752,785	89,392,030
2056		14,443,890	(14,443,890)				181,852,194	14,443,890			3,637,044	(3,637,044)	196,296,084	89,392,030		1,787,841	91,179,870
2057		4,504,055	(4,504,055)				196,296,084	4,504,055			3,925,922	(3,925,922)	200,800,139	91,179,870	(0)	1,823,597	93,003,468
2058		16,284,009	(16,284,009)				200,800,139	16,284,009			4,016,003	(4,016,003)	217,084,148	93,003,468		1,860,069	94,863,537
2059		30,512,333	(30,512,333)				217,084,148	30,512,333			4,341,683	(4,341,683)	247,596,482	94,863,537		1,897,271	96,760,808
2060		36,003,247	(36,003,247)				247,596,482	36,003,247			4,951,930	(4,951,930)	283,599,728	96,760,808		1,935,216	98,696,024
2061		38,240,953	(38,240,953)				283,599,728	38,240,953			5,671,995	(5,671,995)	321,840,682	98,696,024		1,973,920	100,669,945
2062		40,598,964	(40,598,964)				321,840,682	40,598,964			6,436,814	(6,436,814)	362,439,646	100,669,945		2,013,399	102,683,343
2063		43,000,329	(43,000,329)				362,439,646	43,000,329			7,248,793	(7,248,793)	405,439,975	102,683,343		2,053,667	104,737,010
2064		45,413,193	(45,413,193)				405,439,975	45,413,193			8,108,799	(8,108,799)	450,853,167	104,737,010		2,094,740	106,831,750
2065		40,875,426	(40,875,426)				450,853,167	40,875,426			9,017,063	(9,017,063)	491,728,593	106,831,750	(0)	2,136,635	108,968,385
2066		50,530,354	(50,530,354)				491,728,593	50,530,354			9,834,572	(9,834,572)	542,258,947	108,968,385		2,179,368	111,147,753
2067		53,229,211	(53,229,211)				542,258,947	53,229,211			10,845,179	(10,845,179)	595,488,158	111,147,753		2,222,955	113,370,708
2068		56,108,443	(56,108,443)				595,488,158	56,108,443			11,909,763	(11,909,763)	651,596,601	113,370,708		2,267,414	115,638,122
2069		59,862,255	(59,862,255)				651,596,601	59,862,255			13,031,932	(13,031,932)	711,458,856	115,638,122		2,312,762	117,950,885
2070		79,008,163	(79,008,163)				711,458,856	79,008,163			14,229,177	(14,229,177)	790,467,019	117,950,885		2,359,018	120,309,903
2071		103,553,150	(103,553,150)				790,467,019	103,553,150			15,809,340	(15,809,340)	894,020,169	120,309,903		2,406,198	122,716,101
2072		108,587,148	(108,587,148)				894,020,169	108,587,148			17,880,403	(17,880,403)	1,002,607,317	122,716,101		2,454,322	125,170,423
2073		113,792,880	(113,792,880)				1,002,607,317	113,792,880			20,052,146	(20,052,146)	1,116,400,197	125,170,423		2,503,408	127,673,831
2074		119,175,524	(119,175,524)				1,116,400,197	119,175,524			22,328,004	(22,328,004)	1,235,575,721	127,673,831		2,553,477	130,227,308
2075		142,560,461	(142,560,461)				1,235,575,721	142,560,461			24,711,514	(24,711,514)	1,378,136,181	130,227,308		2,604,546	132,831,854
2076		149,491,249	(149,491,249)				1,378,136,181	149,491,249			27,562,724	(27,562,724)	1,527,627,430	132,831,854		2,656,637	135,488,491
Total		1,510,090,554	(1,510,407,207)	2,406,294	(2,406,294)			1,576,713,190	(51,154,125)		307,705,728	(305,637,363)			34,422,774	101,065,717	

3. Initial deposit of $25,000,000 made with transfer from the General Reserve Fund Pledged Account.
4. Transfers from the Pledged account to fund initial deposits in the O&M Reserve and Ramp-Up Reserve/Restricted Account
5. Debt Service payments on the Appropriation Bonds not covered by Appropriation Revenues and Subsidy payments due to sequestration.
6. In FY 2017, prior to financial close, a portion of the earnings from the Appropriation Bond project funds and the 2010 Toll Revenue Bond project fund were transferred to the pledged account to fund various reserves and the remainder was transferred to the Unpledged Account.

7. Transfers out represent transfers to the R&R Fund to prefund future expenses.

Financial Model (Monroe Expressway System + Marshville Extension)



Prepared by PFM as of 11/7/2025

Marshville Bypass Tolling Pre-Submittal Assessment (PSA)

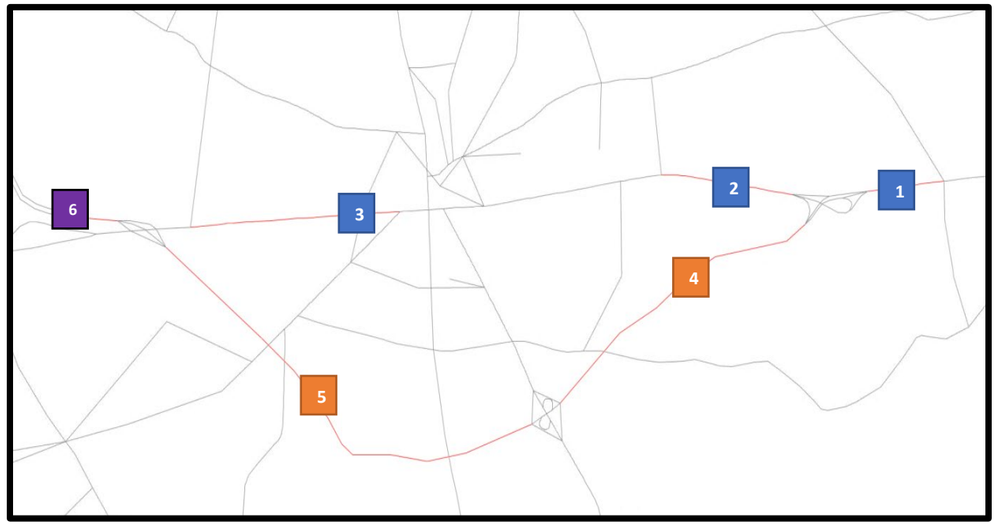
1. Average travel time savings in 2050
    a. Average peak travel time savings in 2050 is approximately 6 minutes.
    b. Peak travel time in 2050 using US 74 is approximately 11 minutes, compared to 5 minutes using the Marshville Bypass. This seems reasonable as Google Maps estimates peak travel time on US 74 today to fall within 9-12 minutes.
2. Percent diversion for Marshville Bypass 2050
    a. 65% of trips travel through Marshville in no build scenario and are eligible to divert if Bypass is built.
    b. Diversion
        i. Westbound Traffic
            1. 100% of eligible through trips and 5% of local trips use the Bypass if the facility is toll free.
        ii. Eastbound Traffic
            1. From Monroe Expressway - 100% of eligible through trips and 9% of local trips use the Bypass if the facility is toll free.
            2. From US 74 (west of Monroe Expressway - 75% of eligible through trips (48%) and 7% of local trips use the Bypass if the facility is toll free.
    c. Tolling the facility results in roughly 40% reduction of travel on the Bypass
    d. MRM22v1 toll rates for Marshville Bypass assume the same rates as the Monroe Expressway model pricing structure of $0.16/mile.
    e. Please note - the MRM22v1.0 diversion curve is approximately 10 years old.
3. Model needs to be run as a free facility.
    a. See table below.
4. Model numbers on each side of the bypass.
    a. See table and corresponding map below.

Model Used: MRM22v1.0

- Recommended volume range for 2025 facility with no tolls : 15,000-19,000
- Recommended volume range for 2050 facility with no tolls : 19,000-23,500

Street	ID	Between		2019 Count*	2018 Volume	2025 Volume (No Build)	2050 Volume (No Build)	2025 Volume (No Toll)	2025 Volume (Toll)**	2050 Volume (No Toll)	2050 Volume (Toll)**
US 74	1	East of Marshville Bypass	External Station	19,980	20,000	21,000	26,500	21,500	21,500	27,000	27,000
	2	West of Marshville Bypass	Marshville	22,140	20,000	23,200	27,900	6,400	15,500	8,000	19,400
	3	Marshville	Monroe Bypass	25,900	20,000	27,200	33,300	11,400	22,600	14,400	28,300
Marshville Bypass	4	US 74	Marshville Interchange					15,100	6,000	19,000	7,600
	5	Marshville Interchange	US 74/Monroe Bypass					18,600	7,400	23,200	9,300
Monroe Expressway	6	US 74		10,260	13,000	11,000	13,200	11,000	11,000	13,200	13,200

*2019 NCDOT adjusted AAWT. **Toll rate used in MRM22v1.0 for Monroe Expressway $0.16/mile.


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Marshville Bypass Tolling Proposal

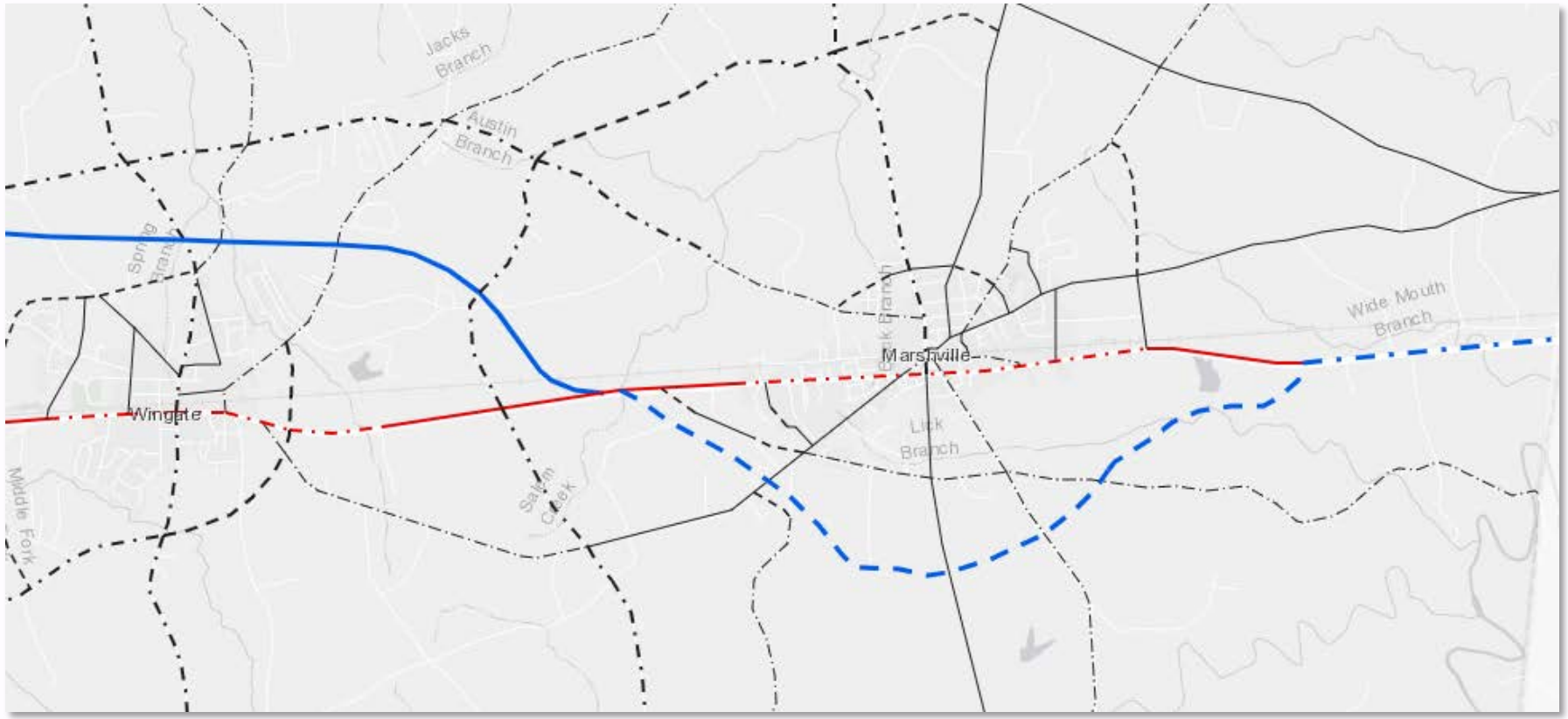
May 18, 2026



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Project

- Scope: 5-mile, controlled access four-lane facility
- Cost: $287 million in 2025 dollars
- Access: Interchange at either end of bypass, as well as at Landsford Road

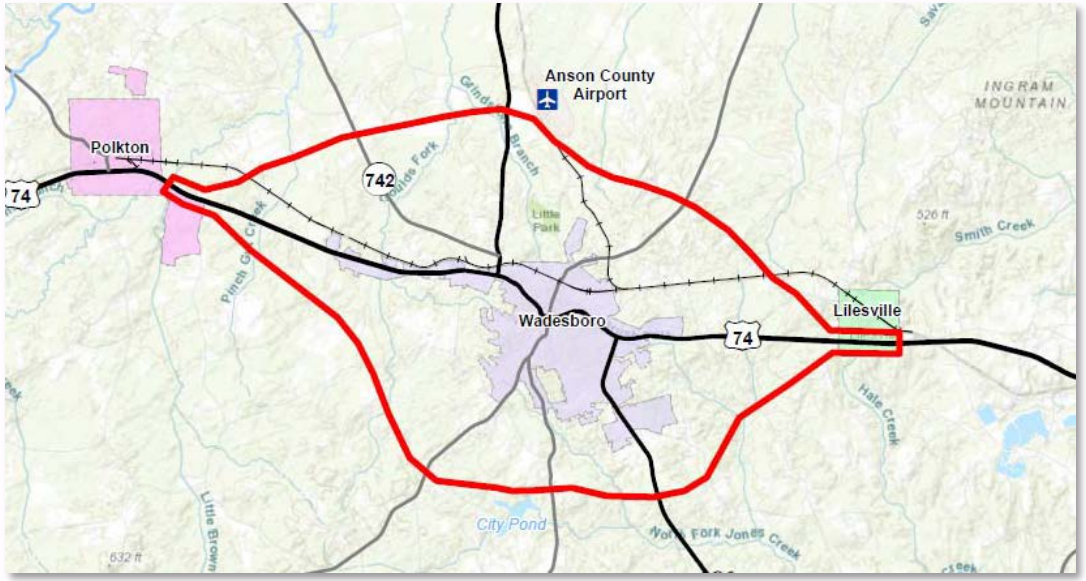


History

- **1984:** Union County Thoroughfare Plan envisioned Monroe Bypass extending east of Marshville
- **2003:** Union County to Rockingham corridor study identifies Marshville Bypass as needed project
- **2009:** Included in Marshville Comprehensive Transportation Plan
- **2017:** Marshville Town Board unanimously passed a resolution requesting removal of the Marshville Bypass of US 74 from the Charlotte Regional Transportation Planning Organization's (CRTPO) adopted Comprehensive Transportation Plan (CTP) since it would not be funded or built for many years
- **2018:** Marshville US 74 Corridor Study confirmed Marshville support for bypass, but proposed tolling to reduce economic impact on the Town
- **2021:** Union County and Marshville pass resolutions request toll study of bypass
- **2021:** Union County adopts comprehensive plan identifying US 74 as future interstate
- **2021 and 2025:** bypass submitted for prioritization in CRTPO Metropolitan Transportation Plans (MTPs) – project did not score high enough to be included in fiscally-constrained lists
- **2025:** NCDOT and NC Turnpike Authority complete tolling analysis

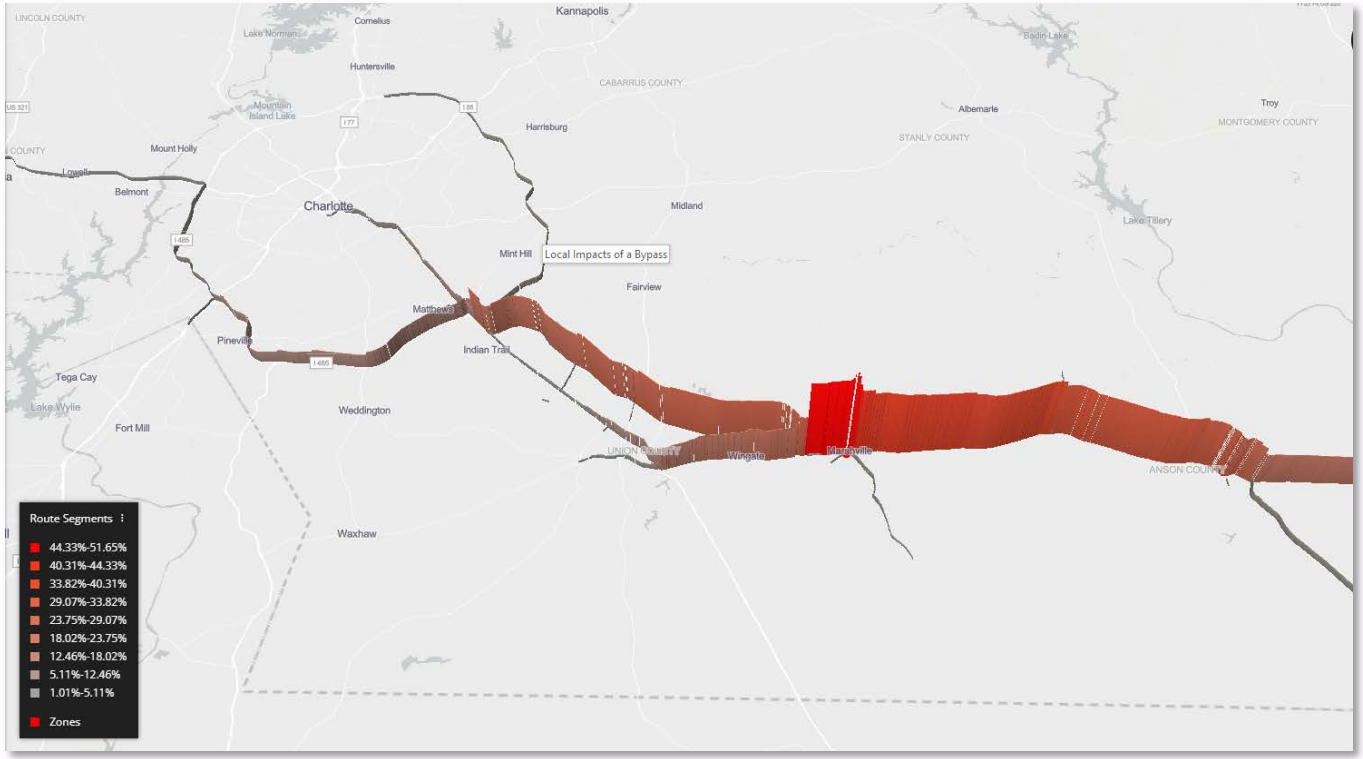
Tolling Scenario

- Stand-alone facility versus part of Monroe Expressway
  - Recommendation is as part of Expressway
  - Tolls can pay for approximately ¾ of cost of project
- Same toll rates as Expressway
- Managed by NC Turnpike Authority
  - Not a PPP project like I-77
- Existing tolls on Expressway would be extended to 2070
  - Currently expire in 2054
  - Tolls for entire corridor would help pay for Marshville portion
  - 2070 (40 years) is practical limit for new bonds
- Official roadway alignment would be after project is funded, such as for the Wadesboro bypass project

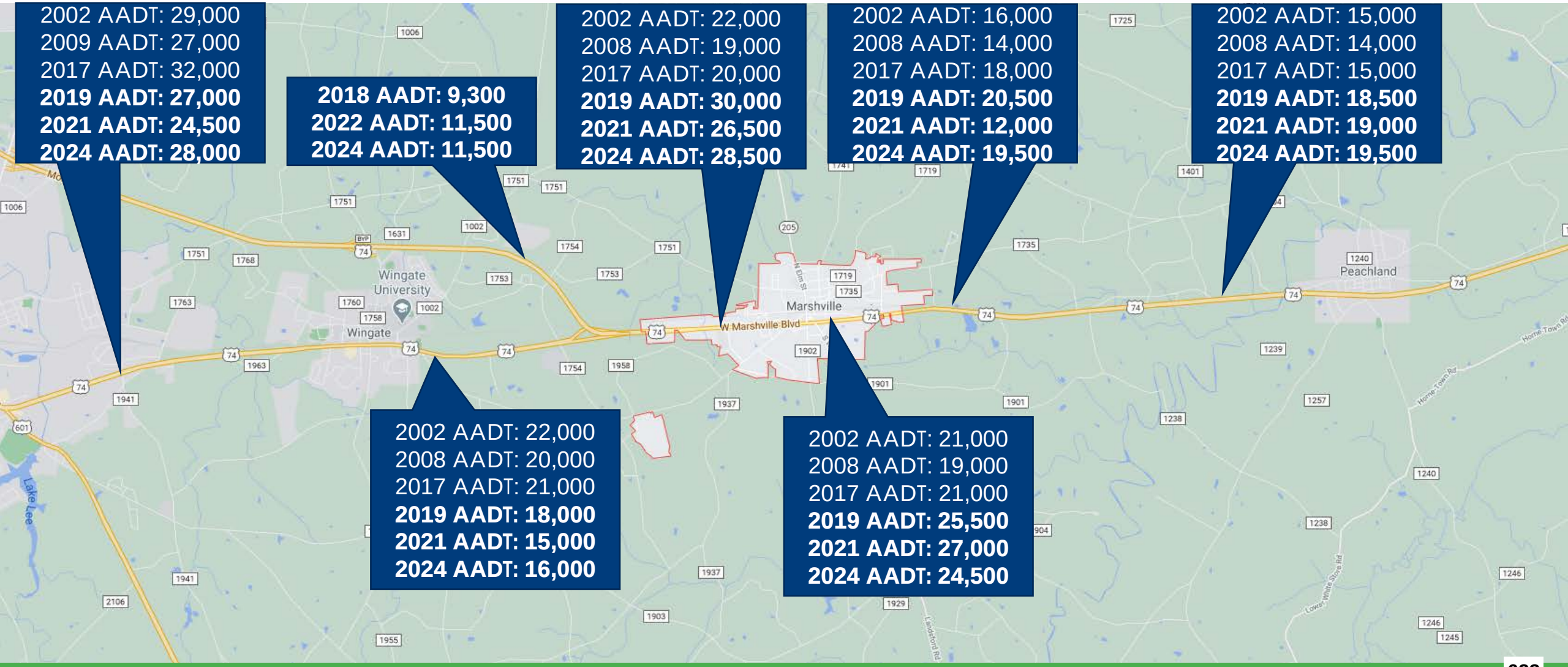


Local Impacts of a Bypass

- 1/3 of total existing US 74 traffic diverted onto Bypass
- Almost half of commercial truck traffic diverted onto Bypass
- Map below shows 2025 weekday traffic flows for all vehicles using US 74 through Marshville
- Approximately $100 million in bonus allocation money available to Marshville and Union County to apply to transportation projects due to using tolling to increasing transportation revenue



Monroe Expressway Impacted US 74 Volumes (Bold Means After Expressway Opening)



Implementation Timeline

- Spring-Summer 2026: Marshville and Union County consider supporting tolling proposal
- Fall 2026: Present to CRTPO and request endorsing as toll project and eligibility to submit to NCDOT prioritization process in 2027
- Summer 2027: Submit for evaluation in STIP
- Summer 2028: Included in Statewide Tier of STIP funding
- Summer 2029: STIP adopted and 2055 MTP amended to include project
- 2029-2040: Project study, design and construction

Marshville Coordination

- Presented to their council May 4, 2026
- Mayor and council expressed no concerns with proposed meeting and understood need for project
- Authorized their town manager to coordinate a joint Town – County meeting

Action Requested

- Questions and feedback



UNIONCOUNTY
north carolina

File #: 26-242 **Agenda Date:** 5/18/2026

TITLE:

Appointments to Boards and Committees

INFORMATION CONTACT:

Lynn G. West, Clerk to the Board of Commissioners, 704-283-3853; Janet Payne, Human Services Agency, Executive Director, 704-296-4348

ACTION REQUESTED:

Appointment of members to fill vacancies.

PRIOR BOARD ACTIONS:

None.

BACKGROUND:

Vacancies exist on the following Boards and/or Committees:

Juvenile Crime Prevention Committee (JCPC)

Appointments needed - 6 total as follows:

- One Representative from United Way/Other Nonprofit
- One Member of Faith Community
- One Juvenile Defense Attorney
- Two Commissioner Appointees
- One Parks & Recreation Representative

Applications received as follows:

- John Kirkpatrick - Member of Faith Community (currently serving and is seeking reappointment)
- Angela Watkins - Juvenile Defense Attorney (currently serving and is seeking reappointment)
- James Johnson Jr. - County Commissioner Appointee (currently serving and is seeking reappointment)
- Natasha Stoval - County Commissioner Appointee (currently serving and is seeking reappointment)
- Jim Chaffin - Parks and Recreation Representative (currently serving and is seeking reappointment)
- Delan Fulgham - United Way/Other Nonprofit (This is a new applicant who is seeking appointment representing United Way/Other Nonprofit.)

Land Use Board
Appointments needed - 3 Regular Members
Applications received as follows:

- Richard Davis - seeking reappointment
- Charles Darren Greene - seeking reappointment
- Andrew Medlin - seeking reappointment
- Jeffrey Clark
- Yash Shah

South Piedmont Community College Board of Trustees
Appointment needed - 1 Member
Applications received as follows:

- Julie Thompson
- Denise White
- David Williams

Centralina Workforce Development Board
Appointment needed - 1 Member for Vocational Rehabilitation Representative
Application received as follows:

- Natalie Ward

Consolidated Human Services Board
The Consolidated Human Services Board (CHSB), pursuant to N.C. general statute 153A-77, is permitted to be composed of up to 25 members and composition of the board shall reasonably reflect the population makeup of the County. Currently, the Union County CHSB has 19 membership positions, each of which has a specific designation. Ten positions are filled and there are 9 vacancies including:

- Consumer of Human Services (4)
- Dentist (1)
- Other Person (1)
- Pharmacist (1)
- Physician-Psychiatrist (1)
- Registered Nurse (1)

As is the County's usual practice, the vacancies available for appointment were advertised by posting a notice on the County's website:
<https://www.unioncountync.gov/government/boards-committees/boards-committees>

At its March 9, 2026 meeting, the CHSB reviewed applications and voted unanimously to recommend that the Board of County Commissioners reappoint the following people to the CHSB:

- Ms. Amy Dickey is eligible for reappointment to fill the "Consumer of Human Services"

position. Ms. Dickey is currently serving as the 2026 CHSB Chair.

- Ms. Brandi Smith is eligible for reappointment to fill the “Other Person” position. Ms. Smith is currently serving as the 2026 CHSB Vice-Chair.

Copies of the recommended applications are included for the BoCC’s review and consideration.

FINANCIAL IMPACT:

For CHSB: Up to $200 per year per member ($20 meeting x 10 meetings per year).

APPLICATION TO SERVE ON APPOINTED BOARDS
COMMITTEES OR COMMISSIONS

BOARD: Consolidated Human Services Board (CHSB) Union County

NAME: Amy Dickey

ADDRESS: 452 Kensington Park Way, Waxhaw NC 28173

TOWNSHIP: Waxhaw YEARS IN UNION COUNTY 22

TELEPHONE: (Home) 704-281-0493 (Office) _____ (Fax) _____

E-mail Address: AmyDickeyCFPS@gmail.com

EDUCATION:

University of South Carolina Upstate, Bachelor of Arts
Florida State University, Professional Certification in Trauma and Resilience (Levels I & II)
North Carolina AHEC, Certificate in Trauma and Resilience (Specialization in Racial Trauma)

OCCUPATION:

P.A.V.E. Solutions, LLC, Founder and Principal Consultant 2024 – Present
Provide consulting, training, and advocacy support to families, school systems, and family serving organizations across North Carolina. Design and deliver training on trauma informed practice, disability rights, special education law, family voice, and systems navigation.

CenterED Resources Consultant and ALP-NC Cohort Facilitator and Learning Team Leader, and ALP Alumni Network Facilitator 2023 – Present

Education Advocate and Family Mentor (Independent Practice) 2017 – Present
Provide direct advocacy and coaching to families navigating IEPs, 504 plans, mediation, ESY, placement, and cross system coordination.

UNCG Center for Youth Family and Community Partnerships:Trainer. 2024- Present

UNC-CH BHS and CWCN. Speaker and Trainer 2025-Present

Mental Health America of Central Carolinas 2020 – 2024 Family Partner and Advocacy Specialist

Please list civic and fraternal organizations in which you participate in Union County.

Union County Consolidated Human Services Board
Healthy Union Advisory Coalition – Co President
NAMI Union – Board President, Educator, and Group Facilitator

Please explain your interest in serving on the above named board:

I am deeply committed to strengthening behavioral health, mental health, public health, education, and developmental disability, services for individuals and families in Union County. Serving on the Consolidated Human Services Board has provided an opportunity to elevate family voice, I work to encourage transparency, and meaningful community engagement to improve coordination across agencies. I value the opportunity to continue contributing in support of the board's mission and the well being of Union County residents

Any other comments:

Have you ever been convicted of a felony? no_____

Date: 3/4/26 Signature: _____

Note: Information provided in this application is considered a matter of public record. It is, therefore, subject to disclosure and copying upon request pursuant to North Carolina's Public Records Law, N.C.G.S. §132-1, et seq.

Return to: Lynn G. West, Clerk to the Board, 500 N. Main Street, Room 914, Monroe, NC 28112 or Fax to 704-282-0121 or e-mail to Lynn.West@unioncountync.gov.

FOR OFFICE USE ONLY: Date Received: _____

APPLICATION TO SERVE ON APPOINTED BOARDS
COMMITTEES OR COMMISSIONS

BOARD: CHHS

NAME: Brandi J Smith

ADDRESS: 7800 Montane Run Ct Waxhaw, NC 28173

TOWNSHIP: Waxhaw YEARS IN UNION COUNTY 16

TELEPHONE: (Home) 504-913-7048 (Office) _____ (Fax) _____

E-mail Address: bsmith1982@gmail.com

EDUCATION:
List Schools, dates attended, Degrees obtained

Western Governor's University – 2026- obtaining a Master's Degree in Nursing Education

Western Governor's University- BSN

South Piedmont C.C. – ADN (Associate Degree of Nursing)

John Ehret H.S. – Diploma, 2000

OCCUPATION:
Past 3 and current employers and positions held

South Piedmont Community College- Adjunct Teacher

Atrium Health- ICU/ER RN

Please list civic and fraternal organizations in which you participate in Union County.

Please explain your interest in serving on the above named board:

I want to continue serving on the Union County Consolidated Health and Human Services Board because I believe strong communities are built on accessible healthcare, responsive social services, and responsible governance. In this role, I have the opportunity to help guide public health initiatives, support vulnerable families, and ensure taxpayer resources are used effectively and transparently. My background as an ICU nurse gives me firsthand insight into the real-world impact of health policy decisions, and I value being a voice for both frontline professionals and the families we serve. Continuing this service allows me to advocate for data-driven solutions, strengthen community partnerships, and contribute to the long-term well-being of Union County residents.

Any other comments:

Have you ever been convicted of a felony? No_____

Date: March 3, 2026 Signature: Brandi J Smith

Note: Information provided in this application is considered a matter of public record. It is, therefore, subject to disclosure and copying upon request pursuant to North Carolina's Public Records Law, N.C.G.S. §132-1, et seq.

Return to: Lynn G. West, Clerk to the Board, 500 N. Main Street, Room 914, Monroe, NC 28112 or Fax to 704-282-0121 or e-mail to Lynn.West@unioncountync.gov.

FOR OFFICE USE ONLY: Date Received: _____